DOCUMENT RESUME

ED 030 792 AC 004 048

The Institute of University Extension Administration (March 9-12, 1968).

Canadian Association of Depts. of Extension and Summer Schools, Ottawa (Ontario).; Ontario Inst. for Studies in Education, Toronto. Dept. of Adult Education.

Pub Date Mar 68
Note-133p.
EDRS Price MF-$0.75 HC-$6.75
Descriptors-*Administrative Principles, *Case Studies (Education), *Educational Objectives, Educational Problems, Evaluation, Individual Instruction, Institutes (Training Programs), Management, Social Change, Student Enrollment, *University Extension, Urbanization
Identifiers-University of Manitoba, University of Toronto

The focus of the eight day Institute for Directors of Extension sponsored by the Canadian Association of Departments of Evening and Summer Schools and the Ontario Institute for Studies in Education was on administration theory--the examination of adult education problems and their effect on the university. Participants attempted to develop general concepts from particular problems through the use of case studies of the Universities of Toronto and Manitoba, and specific solutions from general models by simulation task studies and problem solving theory. Among conclusions were: goal setting and review are the only way to manage an institution in order to bring about improvement in individuals and administrative performance; increases in student population, the explosion of knowledge, and problems of increasing complexity of an urbanizing society are converging upon the university; and individualized instruction can be attained through a systematic approach in providing continuous and professional emphasis on what and how to teach, and how to evaluate. (pt)

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# THE INSTITUTE OF UNIVERSITY EXTENSION ADMINISTRATION

March 9-16, 1968

Sponsored by CADESS and the
DEPARTMENT OF ADULT EDUCATION
The Ontario Institute for Studies in Education
Toronto, Canada

AC004048

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# Preface

From earliest times, at least since the days of Solon and Hippocrates and Confucius, the hallmark of any profession was continuing education and personal growth. Alexander Woolcott, speaking of the acting profession, once growled "The two oldest professions, both ruined by amateurs". He did not recommend courses or seminars of continuing education for either, but this is the road most commonly travelled. Doctors, nurses, lawyers, engineers, architects, social workers, librarians, town planners, all know and expect to return to study at regular intervals.

Some of these educational experiences are offered by a professional society; many are provided by universities. Usually it is the "University Extension" Department that plans, arranges and sponsors these programs.

University extension personnel, so caught up in offering further education for others, have often talked about providing it for themselves. And not only talked. Through their national organization, CADESS, short and long range plans have been made for the continuing education of Canadian extension personnel - staff development, national and regional seminars and individual study and research.

This is the story of one such effort, a short but important step in an exhilarating journey.

J. R. Kidd

# INTRODUCTION

In the complex of new problems facing the universities, one of the root causes of breakdown is often overlooked and always underestimated: unprofessional administrative practices that simply cannot cope with the rapid population growth and social change.[1] Hence it was very much to the point that the CADESS executive focused on administration theory when they turned to OISE for assistance in organizing a seminar or institute that would examine adult education problems as they affect the university.

On the basis of preliminary negotiations during the spring and summer of 1967, with Father Joseph MacNeil of St. Frances Xavier University, Harold Baker of the University of Saskatchewan and Gordon Selman of the University of British Columbia, an eight-day Institute for Directors of Extension was proposed for March, 1968.

The problems were not easy to define. At a meeting in September at OISE, George Boyes of the University of Toronto emphasized an ever-present Canadian problem: the geographic differences -- characterized in Extension by a western orientation to community, an eastern orientation to the individual -- that have hampered effective exchange at CADESS Conferences of the past.

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[1] The case is stated definitively by Philip H. Coombs:

"Any productive system, whatever its aims and technology, requires management. It must have leadership and direction, supervision and coordination, constant evaluation and adjustment....The managerial arrangements typical of educational systems are grossly inadequate to deal with the crisis-ridden set of new challenges and are, themselves, a crucial part of the educational crisis.... The needed revolution in education must begin with educational management."

The World Educational Crisis: A systems analysis. N.Y. Oxford University Press, 1968.

A further requirement was the need to find an operating level for the Institute that focused more deeply than the penetration typical of most conferences, while retaining the national and general scope that might be lost by operating at the pragmatic level of a workshop. It was agreed that the Institute strive to develop (i) general concepts from particular problems -- for example, case studies; and (ii) specific solutions from general models -- for example, simulation task studies and problem-solving theory.

All very well -- models help to clarify issues -- but even within the area of administration, there were too many important problems to hope to survey them all in an eight-day Institute. During this era of radical educational change there has been no systematic examination of the developments in Canadian university extension since Dr. Kidd's 1956 study, Adult Education in the Canadian University. All this emphasized the need to identify Institute goals.

In September a questionnaire had gone out to members of the CADESS executive, who had agreed to serve as a consultative body. Although this technique risked the shortcoming of all questionnaires -- i.e. that the nature of the questions invited the form of response -- the ordering of the replies provided useful preliminary guidelines. These were modified by the CADESS executive at their annual meeting in October and further discussed and re-ordered at a subsequent meeting at OISE. Thus the process of refining the objectives moved through continually tighter procedures, leading to the explicits of internal management and human organization -- in theory and practice -- as they related to university extension. From this base the participants would explore the other issues that had been identified, ranging from national problems of the economy to specific directives for CADESS research.

It is regrettable that accounts of several sessions of the Institute are missing from this report because these sessions are simply not reproduceable in compact form. Examples are the discussions on leadership theory, communication and control led by John Sawatsky of International Behavioral Consultants, Ltd.; the problem-solving process by John Croft of OISE's Department of Educational Administration; and the two simulation task studies by Jindra Kulich of The University of British Columbia. In a sense, it is a reflection of the present state of management theory that these segments are almost ineditable in a report, representing as they do, the trend to process by the behavioral scientists. In effect, the rapid development of human relations theory in recent years created a split in management theory between the behavioral scientists and the classical management approach. Both schools are now moving to bridge the gap, but a wholly satisfactory integration has yet to be realized.

However, as indicated in the Institute presentation by the representatives of Urwick Currie and Partners, Ltd., the new concepts of motivation and participative decision-making are rapidly being integrated into classical theory. Perhaps for this reason, the colleagial organization of university extension provides a specially interesting study of administrative practice. The management consultants examined the internal administrative structure of two extension departments: the University of Manitoba and the University of Toronto, as the basis for the case studies published in this report. The cooperation of these two departments is gratefully acknowledged.

But in the brief time available to them, the consultants did not attempt to find solutions for all the chronic problems of university extension. Formulae were not laid down to resolve the ubiquitous dilemma of finances and the related and equally universal -- but much less necessary -- problem of relations of the department with the university administration. However, as the management consultants of Urwick Currie put it, clarity of the entire organization structure is not essential before attempting to implement management by objectives. The process can begin within the extension department.

The Institute, then, was an "invitation to a beginning". As such, no attempt was made to establish precisely-defined course objectives. The road to such an ideal lies in the systems type of task-analysis described to the Institute participants by Glen Valentine of the Bell Telephone Company. And this is the challenge that CADESS has taken up in the proposed national and regional short courses that constitute the logical development of the Institute -- the continuing process of defining the function of extension in Canada.

We gratefully acknowledge the contributions made by the following, whose sessions could not be reproduced here, but whose presentations in the Institute were no less vital in contributing to its success:

John Croft, Department of Educational Administration, OISE: *Problem Solving*.

James A. Draper, Department of Adult Education, OISE: *Research*.

H. O. Holt, Human Relations Laboratory, Bell Telephone Company, New Jersey: Systems Analysis in Organization Development.

Jindra Kulich, Director of Conferences and Short Courses, University of British Columbia: Task Studies.

Lewis Miller, Professor of Philosophy, Scarborough College (University of Toronto): Instructional Television.

Leslie D. MacLean, Department of Computer Applications, OISE: Technology.

John Sawatsky, International Behavioral Consultants: Theory of Leadership Style in Administration.

Edward F. Sheffield, Professor of Higher Education, University of Toronto: *Administrative Relations of the University and the Extension Department.*

Cecily Watson, Department of Evaluation and Measurement, OISE: Population Survey.

# INSTITUTE PARTICIPANTS

| | |
|---|---|
| Angela M. Armitt. | The University of Western Ontario. |
| Harold R. Baker. | University of Saskatchewan, Saskatoon. |
| Garry H. Beatty. | University of Saskatchewan, Regina. |
| A. Allan Beveridge. | University of Waterloo. |
| George H. Boyes. | University of Toronto. |
| Knute Buttedahl. | The University of British Columbia. |
| Robert Chelini. | Loyola of Montreal. |
| Gilles Cloutier. | Université de Montréal. |
| Mary C. Cutler. | Mount Saint Vincent University. |
| Jindra Kulich. | The University of British Columbia. |
| Gérard Lafrenière. | Laurentian University (formerly University of Ottawa). |
| Benoît Letendre. | Université de Sherbrooke. |
| Rev. Joseph N. MacNeil. | St. Francis Xavier University. |
| Gordon Selman. | The University of British Columbia. |
| Fred Terentiuk. | The University of Calgary. |
| Stuart Tweedie. | University of Manitoba. |

# SCHEDULE

## INSTITUTE OF UNIVERSITY EXTENSION ADMINISTRATION

## March 9-16, 1968

### Saturday, March 9

- Registration - Room 412, 102 Bloor Street West, Toronto
- Films on management, motivation, etc.
- Edward F. Sheffield, Professor of Higher Education; Executive Vice-President, Council of University Presidents of Ontario: Administrative Relations of the University and the Extension Department
- Discussion
- Cocktails at Park Plaza Hotel
- Royal Alexandra Theatre. Rolf Hochhuth's "The Soldiers". World Premiere of the controversial Churchill play

### Sunday, March 10

- J. R. Kidd: Resume of the Institute format
- Task study: Management by objectives
- Working Lunch
- Theory of Management by Objective developed by Urwick Currie, Management Consultants

### Monday, March 11

- Universities of Toronto and Manitoba Studies. Presentation by Urwick Currie
- Discussion and Evaluation
- John Croft, OISE, Department of Educational Administration: The Problem-Solving Process and Application of Theory to an Organizational Problem (based on a selected director's real-life problem).

Tuesday, March 12

- Cecily Watson, OISE: Population Survey

- James A. Draper, OISE, Department of Adult Education: Review of Canadian Research, Present Problems and Future Directions Required of Extension Research

- Self-problem case studies that suggest research

- John J. Deutsch, Principal-Elect of Queen's University; former President, The Economic Council of Canada: The University and Economic Macro-changes in the Canadian Economy

- Cocktail Party with OISE staff and speakers, Board, and guests, University Room, Park Plaza Hotel.

Wednesday, March 13

- Task Study: Decision-Making

- Lunch at the Toronto-Dominion Tower (not included in fee)

- Visit to Scarborough College. Professor Lewis Miller: ITV

Thursday, March 14

- A. A. Liveright (formerly of the Center for the Study of Liberal Education for Adults, Boston): Unique Problems in University Extension Administration

- John Sawatsky, President, International Behavioral Consultants: Theory of Leadership Style in Administration

Friday, March 15

- H. O. Holt and Glen Valentine, Bell Telephone Company, New Jersey: Systems Analysis: The Organization: The Individual

- John Sawatsky: Management Communications and Control

- Dinner at George Brown College of Applied Arts and Technology (formerly Provincial Institute for Trades and Occupations). Leslie D. McLean, Chairman, Department of Computer Applications, OISE: Technology and Education

Saturday, March 16

- Drafting summaries, interpretations and projections of the self-study problems

INSTITUTE OF UNIVERSITY
EXTENSION ADMINISTRATION

# MANAGEMENT BY OBJECTIVES

by

W. R. Benn
Consultant
Urwick, Currie and Partners Ltd.

# LECTURE

by

W. R. Benn

In setting forth our concept of management by objectives and the fundamentals behind the practical approach that we've developed, it might be a good idea first to ensure that there is a consensus of what "management" really is. I'm sure this diagram is not new to any of you, but I think it's important that we agree that this is what constitutes the process of managing-forecasting, planning, organizing, motivating, coordinating, and controlling. It's useful to think of these processes in terms of mechanics and dynamics of management as a conceptual tool. I'm not suggesting that if you watch a manager in his place of work that you can identify him at a particular moment of time doing forecasting, and at another moment doing some planning, etc. All I'm really suggesting is that this classical concept is a useful device, providing some common terms of reference for our discussion of management by objectives.

In the last ten or fifteen years we've also seen that the idea of management by objectives is quite consistent with the findings of Human Science Research by such men as Dr. McGregor of MIT, Peter Drucker, Dr. Hertzberger, and Dr. Meyers.

Nevertheless, it's rather surprising to find that many companies still have not implemented effectively a practical approach to managing by objectives. You would think that by now most companies would have been quite successful at implementing these new concepts. We in our practice, in fact, find that it's quite otherwise. Many of the larger companies have, of course, made considerable progress in implementation, in rationalizing their organization structure, in defining targets, in creating good measurements, in having good controls. Still, once you move away from the few rather larger corporations on the North American continent, I think it's reasonable to suggest that industry, commerce, profit-making institutions, still have a long way to go towards achieving the greatest effectiveness out of the application of these new concepts. What's the problem then? The concept seems to be well founded, no one takes a major issue with the idea. What seems to be the trouble? Well, to over-simplify a little bit, in our experience it tends to be a combination of several things. Management by objectives tends to be used too much as just another procedure or standard practice. In other words, once established, it should work. Let's create the paper work and the necessary mechanisms and it should go. Or the chief executive too often feels that it's okey for everyone else but he doesn't need it personally. And of course without commitment at the level of the chief executive any attempt is doomed. Also, there's still a widely spread tendency to view management by objectives as just another appraisal technique. Finally in our view, not enough attention has been given to the needs of the individual manager or supervisor, in trying to determine what he needs, for helping him to improve his performance, which after all is what management by objectives is all about.

Let's place our subject in a broad context for a minute. If we were to look at a well-run extension department we could probably determine that the dynamics at work whereby objectives are derived are somewhat as depicted on this chart. Either consciously or unconsciously, there is derived a broad statement of corporate or extension purposes at the level of the chief executive or director and from that, there is an attempt to state the broad objectives in more tangible terms deriving from this extension purpose. Tentative criteria are set in the way of key result areas; what are the factors, what are the areas of overall extension performance that are essential, in which we would like to establish targets and measurements if we are to achieve this broad extension purpose. Then there is a process of creating some sub-objectives or alternatives whereby these rather basic key result areas may be achieved. For instance in marketing, a certain volume of students in a certain population is predicated, what does this imply in terms of pricing and public service objectives and so on. Then there takes place an analysis of the relative effectiveness of these alternatives that have been created, an analysis of the effectiveness of use of resources. What constitutes the optimum of sub-objectives for the extension department in terms of the resources consumed and in terms of the results produced? And then at the next stage there needs to be a statement of what the preferred sub-objectives are going to be. And it seems to me that this whole process is repeated, there's a recycling or a process of reiteration, a testing back as sub-objectives are determined, a two-way process. Ultimately, of course, final sub-objectives have to be stated, that are consistent with the broad statement of extension purposes. All of this of course has to take place within an environment of internal and external conditions, within the context of the personnel skills, the finances, the facilities, and the knowledge that we have available to us and within the context of what is realistic and achievable. This chart is an attempt to depict the dynamics at work as objectives are derived in the corporation or the extension department. It is not intended to suggest that if you looked at the senior level of the large corporation or extension department at their work, that you could discern this pattern in their behaviour. But if we examine the practices of most successful companies it seems to me that we would find something like this in fact taking place on a continuous basis. However, implementation of management by objectives generally does not, nor need it take place, according to the chronology of events that we have depicted here. Rather, more often the attempts to improve company performance through managing by objectives are more fruitful if the primary focus, in trying to get improvement right in the beginning, is on ways and means of helping the individual establish and achieve his objectives regardless of where he might be in the organization structure. What we are saying, then, is, that in our experience, the primary focus in establishing management by objectives, in improving performance of the corporation, lies right with helping the individual manager improve the results that he gets on his job.

What are the needs of the individual manager? If we were to summarize the responses that we get from people, the manager, when asked what he needs to improve his performance, I think it would go something like this: The manager would probably say: Well, exhortation is useless if the executive hasn't given me any targets or goals to aim at. Or he might say, What's the use of sending me away on training seminars because when I come back the same old environment exists and it really wouldn't be the soul of discretion to do anything about my new knowledge anyway - so don't bother sending me on training courses. Or he might say, It really doesn't matter around here because your pay isn't related to what you accomplish in any event. And he would probably say finally, to be constructive about it, "I can improve my performance only if certain needs are met." Let's look at what the needs of the individual manager are: Tell me what you expect from me, give me an opportunity to perform, let me know how I'm getting along, give me guidance when I need it and after all of this, pay me according to my contribution, to the results I achieve. "Let me know what you expect from me." A typical position guide or job description prepared by the personnel specialist just doesn't suffice to let the manager know what is expected of him. Rather, the manager or in extension the assistant or program planner, has to work out jointly with his director a statement of his duties and responsibilities. He must agree with his director on the degree of authority that he is going to have for each part of that statement. Finally, he's got to agree with his director on the standard of performance required for each part of the job, so that he'll have clearly understood objectives to aim at which make sense in the overall goals of the extension division. "Tell me what you expect from me" - the manager must know to what extent he has authority to make decisions about the work he's been assigned and by what measures the executive is going to hold him accountable. How is the director going to appraise his performance? And then, once we've agreed on what I'm going to accomplish, give me an opportunity to perform the work. Obviously, no manager can grow if he isn't given the weight of responsibility and scope for decision-making; and surely he's going to make some mistakes. To us, of course, where organizations fall down is that they go to outstanding lengths to define responsibility but they never really cope with the idea of how decision-making is going to be allocated to managers and supervisors in the organization. Most of the job descriptions I've seen, even for senior managerial positions, are deficient in the sense that they never really attempt to define decision-making authority whether in a positive sense or by identifying those areas that are reserved for the executive. In other words, you can make decisions on all aspects of your job except these things, on which you should check with me first.

To sum up: give me an opportunity to perform, give me a reasonable amount of authority for decision-making with respect to the results that you expect me to achieve. Let's identify and agree on those elements of decision-making where it would be best if I check with you first. But let's agree that outside of those situations I can go ahead and get the job done and you can hold me accountable for it. And, let me know how I'm getting on. Obviously, feedback in a meaningful form as soon as possible after the event is crucial to helping the manager or program planner improve his performance. The feedback can be in the way of statistics, observation and personal comment of the man's director, but certainly it should be a daily and a weekly working process. It should also involve a more formal, periodic appraisal of the manager's performance. And it should dwell on his strength and minimize the impact of his weaknesses. The typical appraisal process, perhaps not so typical today, but certainly still in existence in many cases is the old character trait appraisal which is in many cases highly irrelevant to the manager's performance and a man simply cannot see the relationship between a personality appraisal and the results he is trying to achieve on his job. This is, of course, why executives don't like using trait appraisals, because they feel too that there is something wrong about this - that they shouldn't be put in the position of acting as a personnel counselor or a professional psychologist where the employee is concerned. So, let me know how I'm getting along with respect to the results that you and I agree that I should achieve. And we both need the same kinds of feedback information in order to make this successful. Make sure I get guidance when I need it, says the assistant. Every manager has shortcomings, and the task of the executive is to help the manager identify these weaknesses and then provide necessary guidance and help for overcoming them. In this way, training a subordinate manager is always a personal matter; in extension, a personal matter between the director or assistant director and his people. Based on the analysis of the specific areas where the individual needs help to improve, and whether the training is on the job or in-house training, or exposure to seminars, or a combination of all these things, it must be primarily an agreement between the director and his staff as to what needs to be done to minimize the effects of the individual's weaknesses and to get the greatest advantage from his strengths.

Obviously, it's uneconomic and it's frustrating for the individual to give him training that he doesn't need and which he realizes he doesn't need; the training should match what he needs in order to get the kind of results he and his director have agreed on. And finally, staff says, "Pay me according to my contribution." Obviously it's meaningless to go through the first four steps and then fail to provide the motivation and the reward to help men make a sustained effort. Mind you, the intangible job satisfactions are important. But so are the material benefits and the opportunity for accelerated promotion for those who show through performance that they deserve it. It follows though, and not everyone would see this, that there is no place for continued mediocrity in this kind of an environment and for people who consistently fail to come up to some minimal acceptable standard of performance. Obviously there has to be serious consideration given to how they can best be utilized within the organization or whether it's not in everyone's best interest that some opportunities more in keeping with their particular abilities befound for them elsewhere.

The reason why many attempts to introduce management by objectives have been ineffective is that these attempts have ignored the needs of the individual manager. They have not come to grips with the five points that we have been talking about here. Too much attention is often given to the formal, mechanical aspects of installing just another system or procedure and too little attention has been paid to enabling the manager to perform better.

Basically, what we want to stress is the prime importance of work planning and review at all levels in the organization, if management by objectives is going to yield worthwhile results. The approach we're suggesting requires periodic meetings between the director and his assistants, meetings in which they define and agree on the goals that they are going to achieve. It's a continuous process of reiteration or feedback, frequent sessions of goal-setting and review, so that the assistant's or program planner's goals are continually kept consistent with changes in the broader Department goals or objectives; a process of reiteration continually taking place. And obviously, this doesn't take place effectively if the review and appraisal is tied in with some kind of passage of calendar time. It has to be done with a frequency and a timing that's consistent with the requirements of the work.

So the approach we're suggesting here is one in which there is a continuous kind of rapport between director and assistant or program planner on what the individual's goals are. And it means also a continuous recycling or reiteration to make sure that short term goals in the lower levels of the organization are continually kept consistent with the broader Department plans.

The purpose of these meetings between director and individual staff members is to establish and agree on specific objectives or goals both in the short term and in the longer range. Such meetings hopefully achieve a mutual planning of the individual's work, a review of his progress on previously set goals, and a mutual solving of problems which stand in the way of getting the job done. You may be thinking at this time, that this is not really new and I would have to agree with you. However, three things differentiate it from the typical approach to performance appraisal. The frequency of executive-manager review in this kind of context is based on the requirements of the work, not on the calendar. The primary focus of the review in this context, is planning and target-setting and problem-solving to improve the manager's performance. Appraisal of past performance in this context is really a point of secondary importance and it's significant only to the extent that it provides useful directions for future plans and targets. And finally the focus under this context, is on the future. It's on work and it's on goals instead of personality characteristics and this provides a constructive framework for personal commitments to goals; and in this kind of climate, achievement really becomes a way of life.

Director and assistant focus positively and continuously and frequently on achievement, and what needs to be done in the short term and in the long term. They focus on devising legitimate, reasonable measures of this achievement that they both agree with. They focus on devising the means whereby they'll get feedback to indicate to them whether or not achievement is in fact taking place as agreed. And they are only focused secondarily on how well the man has performed, on the appraisal aspect, to the extent that it provides useful direction to fulfilling some of the assistant's needs, or useful direction for re-establishing the individual goals.

Let's summarize some of the reasons why management by objectives works most effectively in this kind of context. I would suggest to you that the approach that would be taken here provides the following:

- it provides a constructive climate for the assistant and his director to solve mutually the problems involved in getting the job done. The focus is positive - what's involved in getting the job done.

- It provides a means of getting the department or divisional needs translated into the goals or targets for individual managers at lower levels in the organizational hierarchy.

- It provides a practical way of quickly adjusting the direction of individual work plans to meet the changing needs of both the Department and its public. Again the idea of reiteration or recycling here. If there should be a change in the direction of achievement for program planners, the time to bring that change about is now. It's not to wait until the next review period which may be five months away, rather the time to do it is in the continuous and frequent rapport that the director and the staff members have, so that the staff's goals are at all times keyed into, and are consistent with, what the division or the department is attempting to achieve.

- this kind of environment provides an increase in the assistance employees receive from their executives in planning for their future personal development. Planning for personal development is not related to some vague assessment of personality characteristics. It is related to what the employee needs to perform better on this particular job and to achieve these goals that have been set.

- It provides greater assurance that an employee's strengths, his abilities, skills, and interests will be reflected in the work he does and in the way he does it. And finally, this kind of a climate for goal-setting and review provides a positive change in attitudes, we found, and changes in morale with significant increases in specific actions taken by employees to improve their own performance.

- It provides a basis and environment in which the employee is motivated to exercise self-control over his own performance. He and his executive have agreed on the goals, on the targets that they want to achieve. They've agreed on the means whereby this is going to be measured and the information that is going to enable this measurement will be made available to the administrator as well as the manager.

So, in this environment, we find positive changes in attitude and morale on the part of the people in the organization and an increase in the specific, spontaneous actions taken by managers to improve their own performance. In our view, based on our experience with quite a number of companies, this is the only environment in which management by objectives can be made effective.

It cannot be achieved by dictation by the chief executive or by designing neat procedures. It doesn't work. Essentially, management by objectives must manifest itself in an attitude or conviction on the part of the chief executive and other senior individuals in the organization, that this is the major means available for bringing about continuing improvement in individual and Department performance. Management by objectives must manifest itself by a commitment, an attitude on the part of the senior people that this is the only means available to them for bringing about improvement in their organization. It should be obvious that management by objectives can be beneficial only to the extent that the organization structure is defined and individuals have a clear grasp of their respective responsibilities and authority. What is most obvious to us, however, is that most organizations' structures have not been so defined; the organization structures of most companies and of most institutions, whether profit-making or otherwise, are typically less than adequately defined, even in most of the best run corporations. So if the senior management were to wait until the organization structure was clarified before they launched an attempt to introduce management by objectives they would never come to grips with the problem, because organizations in a sense are never really clarified. In one sense, they are always being clarified and changed. So, one of the common mistakes that's made is to assume that you can't implement management by objectives until the organizational structure is made clear. In our view this is wrong. Rather, the implementation of management by objectives is the major means or catalyst whereby clarity of organization structure, clarity of extension objectives, can in fact take place. You mustn't wait to get clarity at the top and clarity in the structure. Rather, the approach that we're suggesting here is to start wherever you can, wherever assistants or program planners have a positive disposition about improvements in the organization. Start there, and this will have an impact up, down, and sideways in the organization which will ultimately bring clarity in structure and improvements in objective-setting and management practices throughout the organization.

In the initial stages of implementing management by objectives, it will quite often be most effective for the director and the assistants to agree on a few immediate priorities for the assistants.

Set simple short-term goals - within certain of the key result areas, the critical areas of performance that they can agree on for the assistant's performance, rather than trying at the outset to define and agree on all aspects of the individual's position, his performance and his results. And this is particularly so where the organization structure has been poorly defined in the past. What we're suggesting is that it's much more effective if the Director and the assistants will come to grips initially in trying to improve performance through management by goals or objectives, if they will take one step at a time, notwithstanding that there may not be complete agreement between them as to the overall role that the assistant is to take in the organization. At least they can agree on a few short-term priorities, and this has some very definite advantages as we'll try to point out. In an extension department or a company in which the structure has been poorly defined and responsibility and authority wasn't clear, if you wait for the day until all of this is clarified, you'll never really get launched.

Such an approach creates a climate for focusing positively on the assistant's contribution to overall results, rather than the intricate details of how the results are going to be achieved. This is much more effective than trying to think through at the outset all aspects of the assistant's role in the undertaking. Rather, once the positive climate for achievement of a few short term goals or objectives has been created among all assistants and program planners, the clarification of the positions and position-relationships in a broader sense can be much more readily achieved. So what we're suggesting is, let's first of all create a positive climate or environment for achievement. And this is what's lacking in so many organizations. They get so involved and concerned and anxious about the fact that the organization isn't clear, that we don't know what our authority is, that the Director is making all of the decisions, that we never really get off home base. Yet, there is a convenient, useful way of getting out of this vicious circle, and that is: Directors, assistants, planners, to take a hand and at least agree on some short-term objectives or goals, create a climate for positive thinking and achievement and the rest comes more easily. And this has been our experience, the climate is so important to change the negativeness that so often pervades the thinking of supervisors; to change this to thinking positively about what they're going to achieve in the next week, in the next month, and in the next three months, and have them focusing on that rather than consuming themselves with anxieties about the fact that their Director will not let them make any decisions or no one knows what their right hand is doing in this organization anyway. We all know how ineffective we can become if we let ourselves get consumed with anxieties about what has happened in the past. You have to break out of this and establish a climate that is positive and reflective. And then, when we've made some progress, when we've got that kind of climate, then we can think more about the definitive development of the organization structure and progress. In other words, initially the Director and assistants agree on at least a specific course of action in the short-term and the measurement of performance is strictly with respect to these few priorities that have been established. Once we've got this kind of thinking going, once Director and assistant are looking at their roles in a positive sense, then in time, we can develop the more fully, the total organization structure in which the longer term targets for assistants are defined, in which a measure of performance is not just with respect to the short-term priority plan that they have devised but also with respect to the continuing standards for other aspects of performance that are defined in terms of extension management. Use the idea of priorities with the assistant initially. Get his agreement on a few things at first. Get him thinking positively about his job and then come back, ultimately, to a fuller definition of the individual job in the total extension function. What do we mean by a plan of priority?

Well, here are some subject headings, some short-term things that he should be achieving. And let's write these out, and each of us take away a copy of the written agreement as to what is going to develop in the next three to six months: A brief summary statement of the need for actions to be taken, whether this is derived from performance against certain of the criteria in the extension job description or whether it is in the nature of a problem that has to be overcome if the program planner is to improve his performance. And then let's show what is going to be required in terms of time, quantity, quality, cost also, whatever measures are applicable to the situation. The action to be taken should be broken down into stages and the various steps involved should be shown. And also, we should record here what action is to be taken with respect to the assistant's own personal development. If one of the roadblocks to improving his performance is lack of skill in certain areas, certain lack of knowledge or techniques that are applicable to his situation, then obviously he has to be brought up to some minimum acceptable level. What action is the director going to take to support his assistant? This is where we so often fall down. So we suggest, state specifically the steps to be taken by the director to assist the assistant or program planner in achieving what is agreed he should achieve. If there are certain kinds of information that should be coming to the planner that aren't coming to him, that he needs in order to check progress on certain aspects of his work, then perhaps the director should undertake to make sure that that information in fact comes to him, in a timely way and at appropriate intervals.

Target dates for completion of action.

Target dates should be realistic and achievable and take into account any priorities established by higher administration. And again, where action is broken down into phases, a target date should be set for each phase of the action. Some of you are going to say, "Well, is it really necessary to write all of these things down, and put down the date, and get agreement on them?" In my experience, absolutely. There is just no other way that we have found yet to achieve a consensus between levels of administration as to what they're going to do and what kinds of standards are to be set, and what kind of time is supposed to be attached to their accomplishment. So, it's essential that it be written down in our view.

Comments on actions, delays, and evidence.

This column is to be completed in the light of experience or when the next performance appraisal is due. Let's look at its specific plan of priorities. This is a relatively simple action plan which was the first attempt in a particular company two or three years ago to get going on management by objectives. This was a position of refrigeration service management and look at the seemingly unimportant matters that had to be dealt with and detailed in order to get some improvement in this area. What were some of the factors that were limiting performance of the supervisor, and preventing him from reasonable achievement? Well, it was detailed paper work, a problem that might exist anywhere, including extension. There were a number of other factors that were limiting the capability of the supervisor to really do anything about his performance. And until he and the department manager had really sat down, gone through these and written them down, they had never really had agreement on these things. So they also agreed on the actions to be taken to overcome these in the short-term, the objectives to be undertaken in a relatively short-term so that the supervisor could begin to make some improvement. And there were supporting actions to be taken by several people here, primarily by a higher executive in support of the department manager in bringing this about. We even succeeded in getting him to attach dates to when these various elements would be completed. Now, for having done this, at the beginning of 1965, this company and this manager are much further ahead in terms of practical implementation of objectives, in terms of significant improvement in the management environment, in terms of better business. Before they got concerned about what longer term performance critical areas should be, they recognized that there were a number of relatively short-term, simple problems that had to be overcome before the manager could really be expected to improve his performance. So, again, "tell me what you expect of me." Here are some problems, here is what we expect you to do about them, here's the support we are going to provide and here are the target dates we both agreed on - we'll be sitting down about this time to review progress, but in the interval we'll also have a number of sessions with respect to progress on these actions that we've agreed on. So this is an example of an initial attempt to implement management by objectives, a priority plan, an action plan based on the achievement of some relatively short-term priority items for the subordinate manager.

Ultimately of course, hopefully, through the application of goal-setting and review as we've defined it, it would be hoped that administration would bring about clarity in the organization structure itself. So the management job description attempts to define the longer term responsibilities, authorities, standards, targets for the job, and within that context, always a priority plan for the next one, two, three, six months, which identifies major elements for improvement or change within the context of the job description. So, these two things - the job description and the priority/action plan - ultimately constitute the full implementation of management by objectives.

We hear of many different reasons why companies have not been successful in their attempts to introduce effective goal-setting and review: John wouldn't use the proper appraisal procedure; or he wouldn't sit down with his subordinates at the designated time for goal-setting and review, etc. We dismiss these because they're never the basic, the real causes. We think there are six essential, fundamental requirements for management by objectives. And I would show them this way, translated to university extension application.

Conviction: Conviction by the Director, associates, and assistants, that goal-setting and review, or management by objectives, is the major means available to them for bringing about continuing improvement in the department's and in the individual's performance. Conviction at this top level: and if that conviction doesn't exist, it becomes all too obvious all too quickly to the rest of the staff.

Involvement: Involvement of every assistant and program planner in the task of setting the goals for his own performance. A spontaneous involvement, not just giving him a feeling of participation, but rather a sincere spontaneous involvement within the organization with his Director or Head, in setting the goals for improving performance.

And thirdly, a commitment by each assistant and program planner to the achievement of the goals that he's established based on his involvement in setting those goals. The individual is much more likely to strive to achieve if the targets that have been set are set of his own making, or at least have been established in conjunction with his Director.

So: conviction, involvement, commitment, authority.

Authority: Sufficient authority for the individual to go ahead and get the job done. The director cannot continue to make all decisions for him. The director agrees to sit down with him and by a decision analysis if you will, identify the major types of decisions that occur in the period of a week, or a month, or a year, and identify by whom those decisions are going to be made. Usually this is most effectively done by identifying those areas where the director should make the decision. In other words, the basic assumption should be that the assistant or programmer has the decision-making discretions with respect to achieving all of the results which have been agreed upon except for identified elements which should be brought to the director first. So by a process of reserving those things that need to be referred, authority can be defined.

Support: The assistant has to know that he has the support of his director in those situations where he needs it. Obviously, any manager at any stage in his development is going to be deficient in terms of some requirements of the job. He's got to have the confidence that his director will support him in these kinds of situations and that he can go to his director for help **when** he needs it.

Knowledge: Finally, each assistant, etc., should have access automatically to the kind of information that will enable him to make judgements about the effectiveness of his own performance. In other words, he shouldn't have to go scurrying about to find out, to get cost data or budget data or other kinds of data relative to his own achievement. This kind of information should come to him and the procedures should be in place that enable him to have the kind of information he needs at the intervals at which he needs it, to make decisions and judgements about his own performance, and to make changes in direction where this is necessary.

One more chart.

I believe we owe it to Dr. Scott Myers, who has done considerable research as has Hertzberger and a number of others into motivation. The essence of their findings is that many of the things that we have typically felt in the past to be 'motivators' are really in our affluent society perhaps not motivators at all - that the salaries, the physical emoluments, the social groups at work and the security that comes about through having pension arrangements and so on, these elements, although necessary, are not really motivators. Rather, the elements that motivate can be better characterized by the words growth, achievement, responsibility, recognition, delegation, access to information, freedom to act, involvement in goal-setting, planning, problem-solving, etc.

"Effective job performance depends on the fulfillment of both motivation needs and maintenance needs. Motivation needs include responsibility, achievement, recognition and growth and are satisfied through-the-media group in the inner circle. Elements that are predominantly associated with achievement in the job itself are those elements which are characterized as the motivators. Motivation factors focus on the individual and his achievement of company and personal goals. Maintenance needs, on the other hand, those that are depicted in the outside circle, are satisfied through media listed here on the periphery of the circle. Peripheral to the task and usually group administrative, maintenance factors have little motivational value, but their fulfillment is essential to the avoidance of dissatisfaction. An environment that is rich in opportunities for satisfying motivation needs leads to motivation seeking habits on the part of individuals. And a job situation that is sparse or lacking in motivational opportunities, encourages preoccupation with the maintenance factors."

You can conclude from that (to the extent that you accept the findings of social science research) that the idea of goal-setting, of management by objectives, is consistent with the findings of the research that has been done to date, and highly inconsistent with some of the assumptions we've held in the past about what motivates individuals. As a matter of fact, if these are valid findings, then it appears to us that goal-setting and review, or management by objectives, is the only way to manage the enterprise, be it a profit-making institution or an extension department. This goal-setting and review must be a way of life with management, an attitude, a disposition that this is the way to bring about improvement in individuals and in overall administrative performance.

* * * * *

DRAFT

# UNIVERSITY OF TORONTO DIVISION OF UNIVERSITY EXTENSION

# TRANSCRIPT OF CASE STUDY PRESENTATION

TO

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION SEMINAR

BY W. R. BENN

ON
March 11, 1968

## INTRODUCTION

Good morning ladies and gentleman. Our purpose in presenting these case studies to you is, hopefully, to generate a good deal of useful discussion among you. After the relatively short periods of time that Paul White and I spent in the Winnipeg and Toronto Extension Divisions respectively, we don't purport to have a great number of answers to your problems. But we have, we think, a number of observations and questions to raise with respect to organizational and administrative aspects which, as we suggested yesterday, we think have very broad application whether you're managing extension activites or any other kind of enterprise. In order to avoid duplication in the kinds of things Paul White and I are going to be talking about, we are going to conduct ourselves in a particular way; Paul will be covering certain elements of the Winnipeg Extension activities, for instance, liaison and co-ordination with department heads and faculty, and a number of the observations that Paul is going to make in this respect, are not too unlike the observations I would have to make about similar kinds of phenomena or problems in the Toronto area. So we have each picked particular aspects of the situation in each case and hope in this way to get a total coverage, and avoid unnecessary duplication.

We considered for some time how we might best handle the material most effectively from your standpoint. As you know, initially we had thought that we would have two separate case studies, presented on different days. But finally we decided that it would be best if we put both of these cases together because, as stated, there were a number of areas in which comments, or tentative findings, were applicable in both situations. We thought there would be a far amount of redundancy or repetition if we conducted two separate case studies. What we decided to do was to put the two of them together.

I'm going to take a few minutes now to cover some of the essential background of the Division of Extension at the University of Toronto with you. When I finish Paul is going to do the same thing with respect to the University of Manitoba. We will then construct a number of propositions for you, which give fairly broad coverage to the kinds of questions that we think are pertinent. We're going to try to do this, as much as possible, by posing these questions in terms that make their consideration applicable not only to Toronto and Manitoba, but also to some of the other institutions that you people represent. It is hoped in this way that the discussion will be as useful as possible to you.

Are there any questions on how we plan to achieve this? I would suggest then, that for approximately the next 60 minutes, Paul and I bring you up to date on the background of these two institutions, and make our observations about various aspects of the organization and administration.

## SIZE OF DIVISION

Extension activities have been a part of the University of Toronto since before the turn of the century, about 1894. This chart (No. 1) illustrates the growth of the Division of Extension from between 1954 and 1957. It shows that since

1954 to the present the total annual registrations have increased from approximately 12,000 to slightly over 20,000. And in the same period the full-time staff has increased from 24 to 42 people. This excludes teachers, but includes all administrative, professional and clerical staff. In the last three years there has been a very significant continual increase in both registrations and in the number of staff needed to administer the activities of the Division.

## ORGANIZATION OF THE DIVISION

This next chart (No. 2) shows the present organization of the Division of Extension at the University of Toronto. This structure allocates responsibility to each of six senior positions. The responsibility is allocated by the Director to each of these senior positions for both the administrative aspects of the operation and for development of the academic programs. Positions reporting to the Director are:

Assistant Director - Degree Courses
Assistant Director - Non-degree Courses
Co-ordinator of Business and Professional Courses
Co-ordinator of Engineering Courses
Division Secretary
Co-ordinator of Business and Professional Correspondence Courses

Responsibilities delegated to these senior positions include both the development of the academic program, in conjunction with the department heads and individuals in departments and faculties of the University, and responsibility for the administrative aspects, such as registrations and the actual conduct of the various programs.

Let me explain each of these positions a little more clearly.

The Assistant Director - Degree Courses, is responsible for the development and administration of degree courses in arts, science and nursing. Both summer day and evening courses and winter evening programs are offered. Programs are conducted at the St. George, Erindale and Scarborough campuses, Erindale and Scarborough being two constituent colleges in the Metropolitan area. All programs however, are not offered at all of these three campuses. Predominately the programs are offered at the central campus, St. George. Teachers are recruited primarily from the appropriate University departments. A few teachers are hired from outside. Current enrollment in the degree programs is approximately 5,600, and three degree courses are presently offered. We'll discuss these a little more fully later on.

The Assistant Director - Non-degree Courses is responsible for the development and administration of non-degree courses in the liberal arts and social sciences. Courses are conducted both in the afternoon and evening from October to April at the St. George, Erindale and Scarborough campuses, and to a limited extent at a few other locations in the Metropolitan area. Again, all courses are not provided in all of these locations. Teachers are recruited, again, predominately from the University departments. Current enrollment in the liberal arts and social sciences programs is in the order of 4,800 students. About 65 courses are presently being offered.

The Co-ordinator of Business and Professional Courses is responsible for the development and administration of both certificate and non-certificate business and professional programs. Two certificate courses are presently provided by this section. One of them is in criminology and the other one is in public administration. In addition, several certificate courses are provided under co-ordinated programs with outside associations. Examples of these courses are those conducted in conjunction with the Canadian Federation of Personnel Associations, and the Institute of Canadian Bankers. In these cases, are you are probably aware, the certificates are awarded by the association concerned, and not by the University. In addition to the certificate program in the business and professional area, approximately 80 non-certificate courses are presently offered. Evening courses predominate in this area although there are a few compact two day programs. Courses are conducted in the fall and winter, again mostly at the St. George campus, that is the central campus of the University of Toronto. However, a few courses are offered at Scarborough and Erindale colleges, which are the constituent colleges in the Metropolitan area. Most of the teaching staff, in this case, are recruited from outside the University. Current enrollment in the business and professional courses, both certificate and non-certificate, is at about 4,800 people.

The Co-ordinator of Engineering Courses was created recently to take on the responsibility for non-certificate engineering type courses which are included in the business and professional section. Quite a number of the 80 non-certificate type business and professional courses that were talked about have an engineering orientation and this position has been created, I believe, within the last year to take over the responsibility for a more concerted development of programs in this area. The position of Division Secretary is responsible for the development and administration of the certificate programming business, which is one of the longest standing certificate programs in the Division. This position is also responsible for two non-credit courses that are essentially unrelated to the certificate course in business. One of these is in conjunction with the Nursery Education Association of Ontario, and the other is in conjunction with the Ontario Welfare Council. The certificate program in business is conducted during the normal academic year at night. Current enrollment in this program is around 662. Teachers are recruited mostly from among business and professional people outside the University.

The Co-ordinator of Business and Professional Correspondence Courses is responsible for the conduct of a variety of business and professional correspondence courses in conjunction with nine outside business and professional associations. These are non-certificate courses, recognition being granted by the appropriate association. Present enrollment in the correspondence program is around 1,850.

As I said, both Paul and I have certain observations we wish to make about basic organization structure, not just with respect to Toronto but with respect to Winnipeg also, and this will come later. In summary then, the Division of University Extension at Toronto conducts a wide variety of both daytime and night courses, both credit and non-credit at three campuses, St. George, Erindale and Scarborough but predominately at the central campus, St. George. Current registrations are slightly in excess of 20,000, and the Division employs 42 full-time staff, excluding teaching personnel.

Based on our discussions with various members of the Division's staff, including the Director, and several of the senior people reporting to him, it is apparent that there is a wide range of attitudes among members of the University as to what the role of the Division should be within the University complex. For this reason it is difficult to identify specifically the scope and objectives of the Division, at least in any long term sense. Other than the statements of general purpose that are spelled out in course brochures, there appears to be no specific written definitions of the role of the Division, at least not in a manner which has been effectively communicated to all concerned. It appears to us that this is a contributing factor to the problem of developing more definitive plans and targets in the various sections of the Division of Extension that we have just looked at. This chart (No. 3) shows examples of statements of general purpose from several course brochures.

In summary, with the exception of these kinds of statements, we were not able to find a definitive description outlining the broad purpose of the Division, and more specifically, its objectives in terms of enrollments, program development and organization structure, etc.

## DIVISION ACADEMIC PROGRAMS

Programs provided by the Division can be divided basically into credit and non-credit courses. Credit courses include both degree and certificate courses. You will recall, that we said there were three degress presently obtainable through Extension activities; the general arts course leading to an arts degree, the general science course leading to a bachelor's degree in general science and a degree course leading to bachelor of science in nursing. These are the three degree courses offered. Also, under credit courses there are the three certificate courses that we discussed, the certificate course in business, which is administered by the Division Secretary, the certificate course in public administration and the certificate course in criminology, both of which are administered by the Co-ordinator of Business and Professional courses. There are a number of other co-ordinated programs conducted in conjunction with outside associations, which are also administered by the Co-ordinator of Business and Professional Courses. This is the range of credit courses offered.

Non-credit courses include a wide variety of programs under the major headings of business, professional and liberal arts. This chart (No. 4) provides a summary of all courses offered under these several categories.

## ADMINISTRATIVE PROCEDURES

Procedures for administration in the Division are relatively informal. I'll just identify a few characteristics here which will highlight what I mean by that.

Although short range goals are agreed upon between the Director and his senior staff from time to time, longer range targets and plans tend to be less clearly defined and understood. Review and appraisal of performance and achievements of senior staff by the Director takes place in frequent personal contact. There are no formal review and appraisal procedures for senior staff. Performance criteria or standards are not defined in writing. This does not mean there may not be some but they are not defined in writing. In some cases they are not clearly understood by the incumbent.

Responsibilities and authority of senior staff are agreed upon informally with the Director. There is no written definition of these responsibilities and authority, nor is there a definition of the relationships of senior staff to the members of the University departments with whom they have frequent, continual contact, liaison and co-ordination.

Although the formal organization structure of the Division of Extension is as we depicted it previously on the chart, the actual reporting relationships tend to be somewhat less formal than the chart would suggest, and accountability for results tends to be a shared accountabiltty between the Director and his senior subordinates. Weekly meetings are held by the Director with senior members of his staff as one means of achieving co-ordination.

That is all I wish to say at this stage. This has been an attempt to give some background on the Division of Extension at the University of Toronto. Now Paul White is going to tell you about Winnipeg Extension activities. Then, as I suggested, we hope to develop a number of propositions for you, which I think will serve as a basis for some interesting discussion in the latter part of the morning. Thank you.

Chart 1.

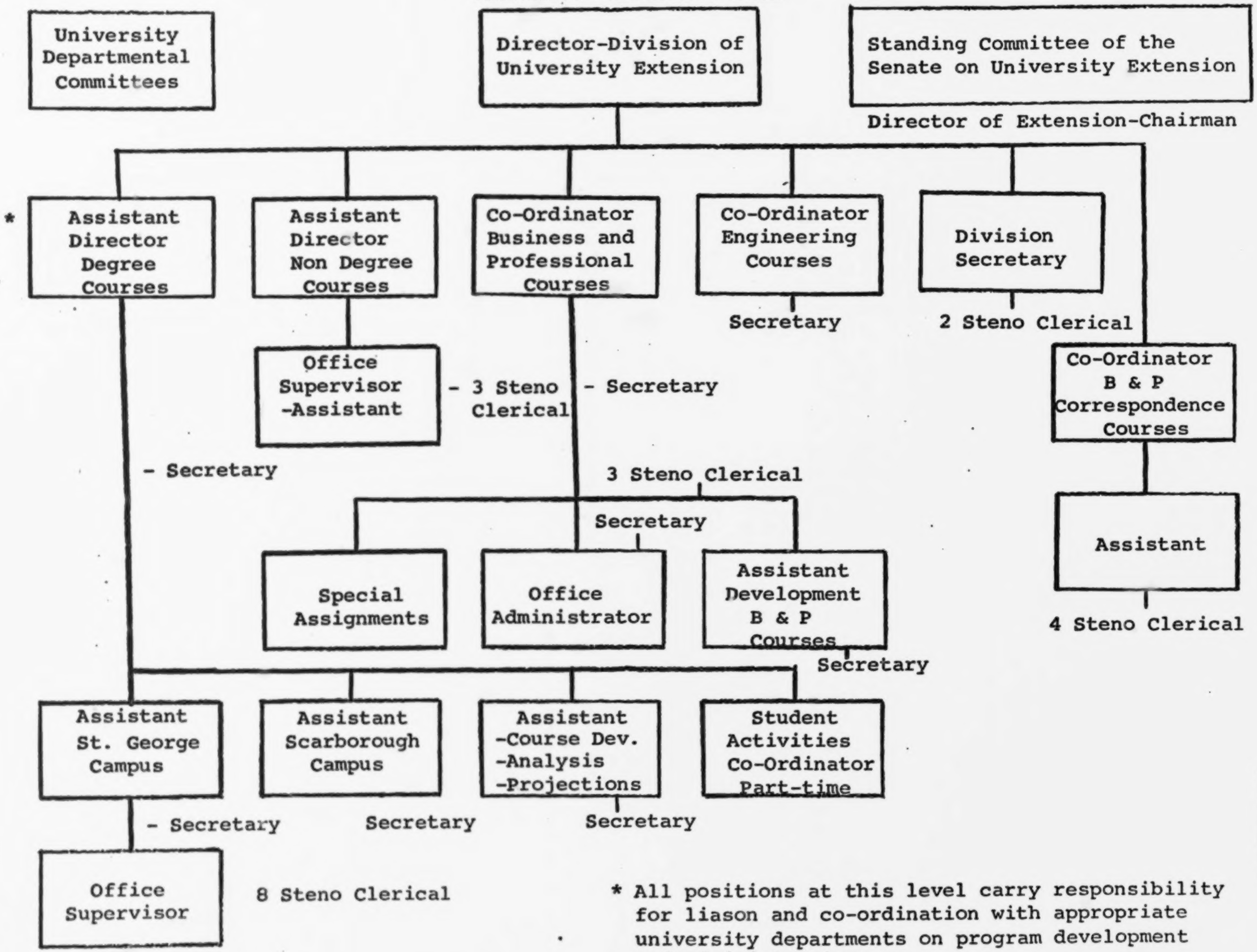
APPENDIX I
Part 1

## DIVISION OF UNIVERSITY EXTENSION

| Year | Total Annual Registration | Degree-Credit Enrolment (People) | Degree-Credit Registration (Courses) | Liberal Arts Courses | Business & Professional Courses | Certificate Course In Business | Correspondence Courses |
|---|---|---|---|---|---|---|---|
| 953-54 | 9,234<br>12,052 | 851 | 1,417 | 2,654<br>3,940 | 2,150<br>3,622 | 253 | 2,844 |
| 954-55 | 10,652<br>13,856 | 1,060 | 1,746 | 2,915<br>3,689 | 2,895<br>4,158 | 335 | 2,926<br>4,016 |
| 955-56 | 13,326<br>17,009 | 1,352 | 2,200 | 4,166<br>5,502 | 2,738<br>3,898 | 400 | 4,025<br>5,004 |
| 956-57 | 15,039<br>18,487 | 1,523 | 2,586 | 4,143<br>5,207 | 3,591<br>4,314 | 491 | 5,007<br>6,305 |
| 957-58 | 13,810<br>16,787 | 1,732 | 2,875 | 3,185<br>5,072 | 2,504<br>3,430 | 512 | 5,492<br>5,557 |
| 958-59 | 14,938<br>18,006 | 2,166 | 3,651 | 3,912<br>4,485 | 3,090 | 527 | 4,846 |
| 959-60 | 15,763<br>16,264 | 2,460 | 4,090 | 4,236<br>4,807 | 3,546<br>4,314 | 608 | 4,215<br>4,075 |
| 960-61 | 12,576<br>13,798 | 2,527 | 4,044 | 3,766<br>4,183 | 3,236<br>3,727 | 603 | 2,493<br>2,758 |
| 961-62 | 13,066 | 2,670 | 4,521 | 4,083 | 2,881 | 691 | 2,695 |
| 962-63 | 14,087 | 3,101 | 5,227 | 4,224 | 3,100 | 800 | 2,602 |
| 963-64 | 14,620 | 3,616 | 5,928 | 4,389 | 3,140 | 827 | 2,313 |
| 964-65 | 14,869<br>15,352 | 4,180 | 6,451 | 4,130 | 3,245 | 837 | 2,161 |
| 965-66 | 18,110<br>18,703 | 5,532 | | 5,318 | 3,905 | 886 | 2,315 |
| 966-67 | 18,445<br>20,465 | 5,983 | | 4,840 | 4,377 | 878 | 2,114 |
| 967-68 | | 6,582 | | 4,766 | 4,795 | 659 | 1,856 |

APPENDIX II

## UNIVERSITY ADMINISTRATION


University Departmental Committees
Director-Division of University Extension
Standing Committee of the Senate on University Extension
Director of Extension-Chairman
*
Assistant Director Degree Courses
Assistant Director Non Degree Courses
Co-Ordinator Business and Professional Courses
Co-Ordinator Engineering Courses
Division Secretary
Secretary
2 Steno Clerical
Co-Ordinator B & P Correspondence Courses
Office Supervisor -Assistant
- 3 Steno Clerical
- Secretary
- Secretary
3 Steno Clerical
Secretary
Assistant
Special Assignments
Office Administrator
Assistant Development B & P Courses
4 Steno Clerical
Secretary
Assistant St. George Campus
Assistant Scarborough Campus
Assistant -Course Dev. -Analysis -Projections
Student Activities Co-Ordinator Part-time
- Secretary
Secretary
Secretary
Office Supervisor
8 Steno Clerical

* All positions at this level carry responsibility for liason and co-ordination with appropriate university departments on program development and administration

## OBJECTIVES

### SAMPLE STATEMENTS - BUSINESS and PROFESSIONAL SECTION

To provide means for interested adults to further their education and training, in many cases regardless of the level of previous formal education.

To impart knowledge in a variety of fields such as finance, economics, marketing, personnel, production, mathematics, science, and engineering.

To give a better understanding of the nature of organizations, how they function and are managed.

To improve professional understanding of new technical, mathematical, or business theories which have come to the fore in recent years.

To create a forum for discussion of subjects common to class interest relating to new concepts, current practises, recent advances in technology or theory, and problem areas.

To stimulate the mind to become both analytical and creative, posing questions, searching for answers, and applying solutions.

### SAMPLE STATEMENTS - CERTIFICATE COURSE IN PUBLIC ADMINISTRATION

This is a course in public administration providing instruction in those areas of political and other social sciences that are essential for an understanding of the executive branch of government and its functions. The program includes basic courses in several social sciences with emphasis on Canadian governments at all levels and their major problem areas.

More specific objectives in terms of enrollments, program development, staffing and recruitment of teaching staff not fully defined beyond current year.

## COURSES PROVIDED

COURSES PROVIDED

EXHIBIT 4

The programs provided by the Division can be divided into credit and non-credit courses.

### A. CREDIT COURSES

Credit courses include both degree and certificate courses. These are:

1. Degree Courses

General Arts Course

General Science Course

Degree Course Leading To Bachelor Of Science In Nursing

2. Certificate Courses

Certificate Course In Business

Certificate Course In Public Administration

Certificate Course In Criminology

Courses Conducted Under Co-Ordinated Programs With Certificates Awarded By Outside Associations.

### B. NON-CREDIT COURSES

The non-credit courses include a wide range of programs under the major headings of Business and Professional and Liberal Arts.

1. Business and Professional

| | |
|---|---|
| Economies and Finance | 10 Courses |
| Management | 28 Courses |
| Marketing | 9 Courses |
| Professional (Including Engineering) | 35 Courses |
| Total | 82 Courses - 1967-68 |

2. Liberal Arts

Approximately 65 separate courses are included in the 1967-68 program.

Urwick, Currie
& Partners Ltd

# UNIVERSITY OF MANITOBA

DIVISION OF UNIVERSITY EXTENSION

# TRANSCRIPT OF CASE STUDY PRESENTATION

TO

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION SEMINAR

by P. C. WHITE

on

March 11, 1968

## INTRODUCTION

As Bill has indicated, our remarks are based on a rather brief review of each of the extension departments. I want to re-emphasize that point prior to presenting to you our comments and observations on their organization. One of the particular problems that I had was keeping up with the changes that were made since Professor Tweedy and I had initial discussions in January.

My remarks, therefore, may not be completely up-to-date, but I think they're still generally applicable. The most recent change that I was informed of, for example, was that the department is now called a Division.

I would like to review with you the present organization of the extension department, the events which have lead to its present status, the trends in terms of enrollment and staff that have gone along with that growth, and then discuss horizontal relationships; in other words, the relationships between the extension department and the faculties with which it must co-ordinate its programmes, and vertical relationships; or the relationships between the extension department itself and the overall administration of the University.

## DIVISION ORGANIZATION

Let us start at the top and run down through the organization structure. (Exhibit I) The one person who is missing from the top part of this chart is the President of the University. Actually, the director of the extension department reports to the dean of arts and science, who in turn reports to the President, who in turn reports to the Board of Governors.

At the next level down there is a group of people who are responsible for carrying out administrative activities within the extension department; such activities as filing, telephone operation, and general clerical activities.

Each of the division heads have their own clerical staff, obviously quite a small staff. In the case of the division head of professional studies, he has a clerical staff of about 1½ people. In the case of management studies, there is a reasonably large sized group; and in case of community studies a smaller group; and in the function referred to as the evening institute a still smaller organization.

Professional staff are organized by those segments of the community at large which make use of their services. The organization breaks down into: a 'management' studies group, a 'professional' group which has a direct association with the professions that one finds at a University, a 'community' studies group which services the rural population and an 'evening institute' which services primarily the urban public at large.

## COURSE OFFERED

The management studies division offered 100 courses in 1967. Of these 14 were withdrawn, leaving a total of 86 presented. Enrollment was approximately 2,700 and this was a particularly rapid rise from 1962 at which time there were five courses offered with an enrollment of 192 persons. The range of courses offered is quite broad, Such courses, and I don't want to go over them all at this point, as a course in public administration for senior civil servants, a course in operations research, and several courses in computer technology ranging from an IBM 360 course to a course on Algol to a course on 'A First Look at Computers' are offered.

In 1967, the professional studies division offered 37 courses and 33 of the 37 were presented to approximately 1,800 people in attendance. These courses were also of a very wide ranging nature, from a certificate course for nurserymen and landscapers to a course in the form of a two-day seminar on Modern Science in the Mouth for the Dentistry Faculty, and another course in the ultimate design of re-inforced concrete structures -- a five day programme.

The community studies division of the extension department is the newest member of the group. It began in 1966 and is primarily concerned with working with rural communities, assisting them in their development of courses to suit their own community needs. (EXHIBIT II) This is a listing of various courses that are offered within the community studies division. Let me state here that there are two key objectives of the community studies division. One is to form an educational programming and consultative service for the community; and the second is to provide adults with a wide range of opportunities for personal and community development. This is really, I think it's fair to say at this time Professor Tweedy, very much in the formative stages, and it's something which will, I think, become clearer as the years go on.

The evening institute, which we referred to earlier as the group serving the public at large, is the oldest of the extension department groups. This is a picture of the courses which were offered during the last semester (EXHIBIT III) Some of those courses, such as the French conversation courses, are repeated year after year.

That, I hope gives you some background in terms of the organization of the extension department as it stands today and some flavour as to the type of courses which are offered within each of the four divisions of the extension department.

## DEPARTMENT GROWTH AND KEY HISTORICAL EVENTS

Let us have a brief look at the events leading up to the present status of the extension department (EXHIBIT IV)

In 1936, the evening institute commenced offering non-credit courses to adult citizens in Winnipeg. At the same time other extension activities continued to be co-ordinated by the general faculty's council committee on public lectures. In other words, the faculty still maintained very strong interest in extension type work.

In 1941, the adult education office was established, a director was hired, various programmes commenced, the director became the Regional agent for the National Film Board responsible for public information programmes, and the arts and crafts division was established; and the grammar division was established.

In 1944, the situation changed. The arts and crafts division ceased to exist, although the film library kept active. The Carnegie grant for rural community development was not renewed. The director resigned, and the president's report made no mention whatsoever of the extension department.

In summary, 1936 - 1944 was a period of some successes, some failures, a general decline in extension activities leading to a re-assessment of "where do we go from here". It seems to me that one of the key points coming out of the period 1936 - 1944, was that the evening institute was seen as the basis for satisfying the needs of adult education. And now, if we look at the courses that are offered by the evening institute, there is noticeable non-academic flavour in these courses. A second point is that the director of the extension department was appointed secretary of the adult education committee. I think, in a way, that appointment might have done much to establish the relationship between the faculty and the extension department by indicating that the extension department had a secretarial relationship to the faculty. If I can be reasonably specific here, a secretary arranges an agenda, takes the minutes, carries out the administrative functions but is not involved in the setting of policy.

In 1945, the Royal Commission on Adult Education was formed; and in 1949 the present department was established. The period of 1949 to 1967 was a period of growth and continued development of the extension activities.

Other key events include the following: In '49 the University itself moved from the downtown Winnipeg area to the Fort Garry campus, which would be approximately six miles south of Winnipeg. The evening institute remained downtown. In '52 the responsibility for the conduct of correspondence courses for credit was transferred from the arts and science faculty to the extension office. In '61 all facilities at the University of Manitoba were moved to Fort Garry including the evening institute. Result -- registration dropped. Six miles is a long way to go on a cold winter's night in Manitoba. In '62 the responsibility for the conduct of credit-granting extension courses was transferred to a new unit, evening and summer sessions unit. As it stands today, the extension department of Manitoba has no responsibility for any credit courses whatsoever. There are two certificate courses offered, of course, but not credit courses leading to a degree. In '64 the present divisional organization was adopted. In '66 the division of community studies was formed.

Growth of the departments' staff, enrollment and budget is summarized (EXHIBIT V).

## VERTICAL AND HORIZONTAL RELATIONSHIPS

Now the other subject that we wanted to present to you this morning deals with the vertical and the horizontal relationship found in the departments. And what we did here was to take one division, of the four in the extension department, the professional studies division, a logical division because it has a direct tie-back to each faculty represented on the campus, and explore these relationships (EXHIBIT VI)

Comments on the chart are those of the head of the professional studies division. Now, let's take two of these as an example. In the faculty of social work, sixteen programmes are underway as joint programmes between the extension department and the faculty of social work. According to the head of the professional studies division, this relationship is the best relationship of any that exists between extension department and any faculty at the University of Manitoba. More or less, the head of the professional studies division feels that he is integral with the planning process that takes place in the faculty of social work. His comments are that he is seen as both 'educator and idea manager'. One can, I think, easily say that there's been a great deal of success in getting extension programmes in social work off the ground.

Take as another example, the Faculty of Dentistry. They have six programmes underway. The form of liaison is with a faculty representative, i.e. one man to represent the faculty of Dentistry in all negotiations with the extension department. Comments made indicate that initiative rests with the faculty, the department's function is little more than administrative.

Now without going into all the various forms of relationships, there are some things that we might conclude in broad, general terms.

Number one is that there appears to be no apparent uniformity of relationship between the extension department and the faculty. There are in fact, many different types of relationships ranging from being represented on the faculty council by being integral with the planning process, to being represented on the faculty council as and when requested to attend when extension business is being discussed, to liaison with the faculty representative; or liaison with the dean, or in certain instances virtually no liaison whatsoever.

The second point, is that there is no apparent rationale for the form of liaison. There doesn't seem to be any rhyme nor reason as to why liaison is in one form in one case and in a different form in another case.

Point three: there is no administrative policy that we are aware of which suggests what the relationship should be. Now, I mean by that, an indication from the university administration, in particular, as to how the faculty should relate and develop programs in conjunction with the extension department.

Point four: is that more extension programmes appear to be mounted where either the relationship is closely related, for example, in social work, or where the relationship is limited. In other words, and as an example, management studies is extremely successful but do not appear to have had close liaison with the business education faculty.

It would appear then that either you have a close relationship and thereby achieve success, or you do not have the close relationship which can also lead to success. This is certainly an oversimplification and there are other factors involved which certainly have a bearing on success in this area.

I'd just like to spend a few closing moments talking about the relationship of the extension department to the administration of the University. Here we are dealing really with the delegation of authorities and responsibilities to the director of the extension department. It would seem appropriate in looking at an extension type activity that we consider delegation under the three headings of curriculum development, financing, and staffing.

Courses must be vetted by the administration, in the sense that requests for courses go to the dean of arts and science, then in the overall scheme of things to the President and the Board. Two, that courses are also vetted by the faculty. And even in the case of a repeat course, one which was put on the previous year, the process is repeated again. There is very little delegation of authority for curriculum development to the extension department itself.

Each course must be approved for its financial viability by the administration and supported by a detailed list of expenditures. Reviewing two or three of these requests it is interesting to note that expenditures at the level of $30 must be approved. There have been some changes recently through introducing global budgeting (taking a group of courses together and having them approved as a whole). In addition to approving each course, an annual budget is prepared by standard objectives of expenditure, and must be approved by the administration. A standard object of expenditure is salary, postage, stationery, etc.

The conclusion is that there is a very rigorous control exercised over the extension department.

Staff being brought on must be individually approved by the administration. Staff for courses are supplied from the faculty, and requests must be made of the faculty.

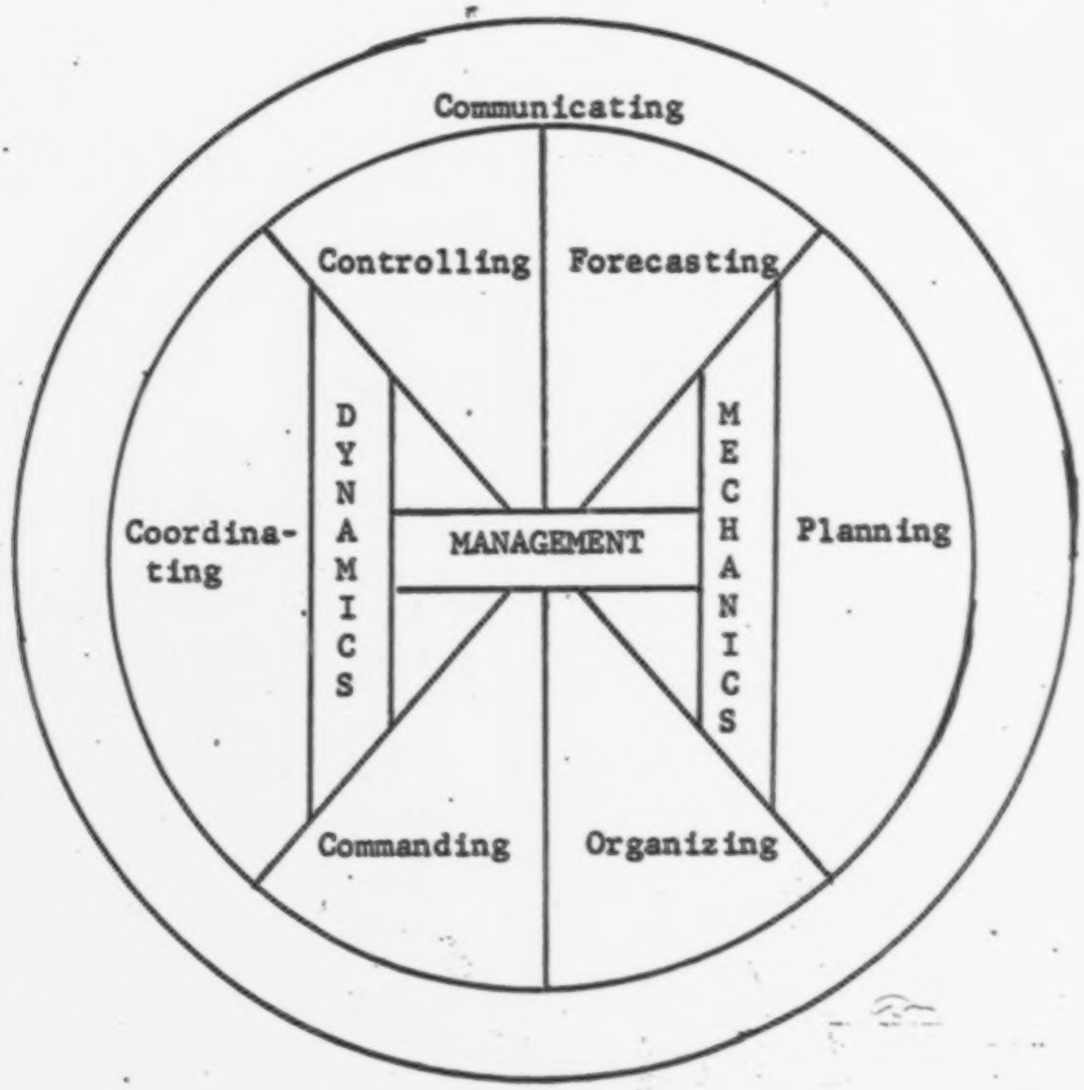
I think it's pretty safe to say, that in terms of vertical relationships, there is very little delegation of authority and responsibility to the director of extension. He is constrained on the one side by the University administration and on the other by the faculty.

## THE SIX PROCESSES OF MANAGEMENT - URWICK

1. Forecasting
2. Planning
3. Organizing
4. Commanding
5. Co-ordinating
6. Controlling

Since management is continuous, the six processes can be arranged in a circle so that Controlling leads back to Forecasting.

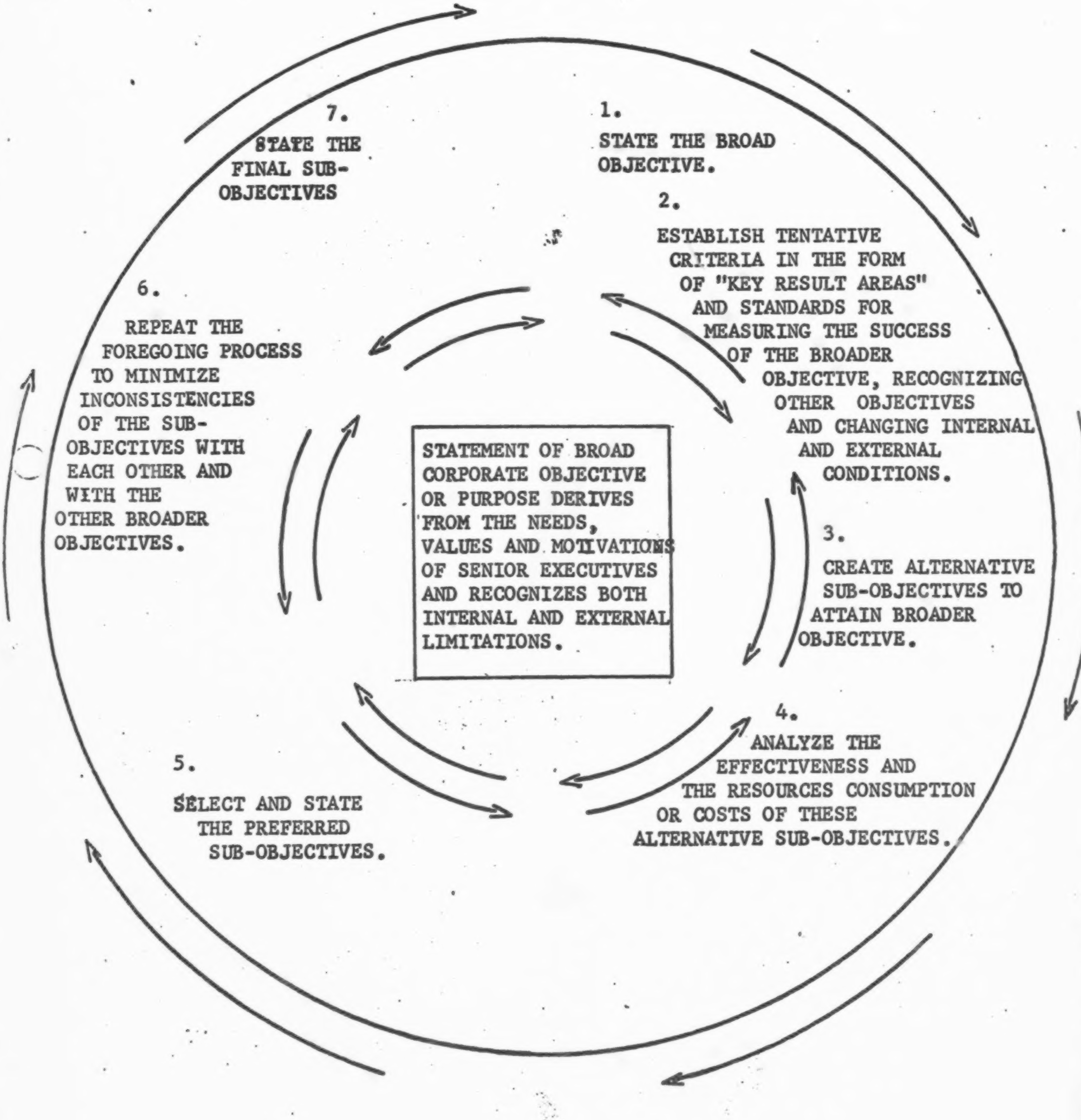
The six processes are bound together and made to live by "communicating".


Communicating
Controlling
Forecasting
DYNAMICS
MECHANICS
Coordinating
MANAGEMENT
Planning
Commanding
Organizing

INTERNAL LIMITATIONS
AND CHALLENGES, E.G.
PERSONNEL SKILLS AND
NEEDS, FINANCES,
FACILITIES, TIME,
KNOWLEDGE, TECHNOLOGY.

## PROCESS OF DERIVING SPECIFIC OBJECTIVES FROM BROADER OBJECTIVES

EXTERNAL LIMITATIONS
AND CHALLENGES, E.G.
LEGAL, MARKET,
COMPETITIVE, PUBLIC
OPINION FACTORS.



1. STATE THE BROAD OBJECTIVE.

2. ESTABLISH TENTATIVE CRITERIA IN THE FORM OF "KEY RESULT AREAS" AND STANDARDS FOR MEASURING THE SUCCESS OF THE BROADER OBJECTIVE, RECOGNIZING OTHER OBJECTIVES AND CHANGING INTERNAL AND EXTERNAL CONDITIONS.

3. CREATE ALTERNATIVE SUB-OBJECTIVES TO ATTAIN BROADER OBJECTIVE.

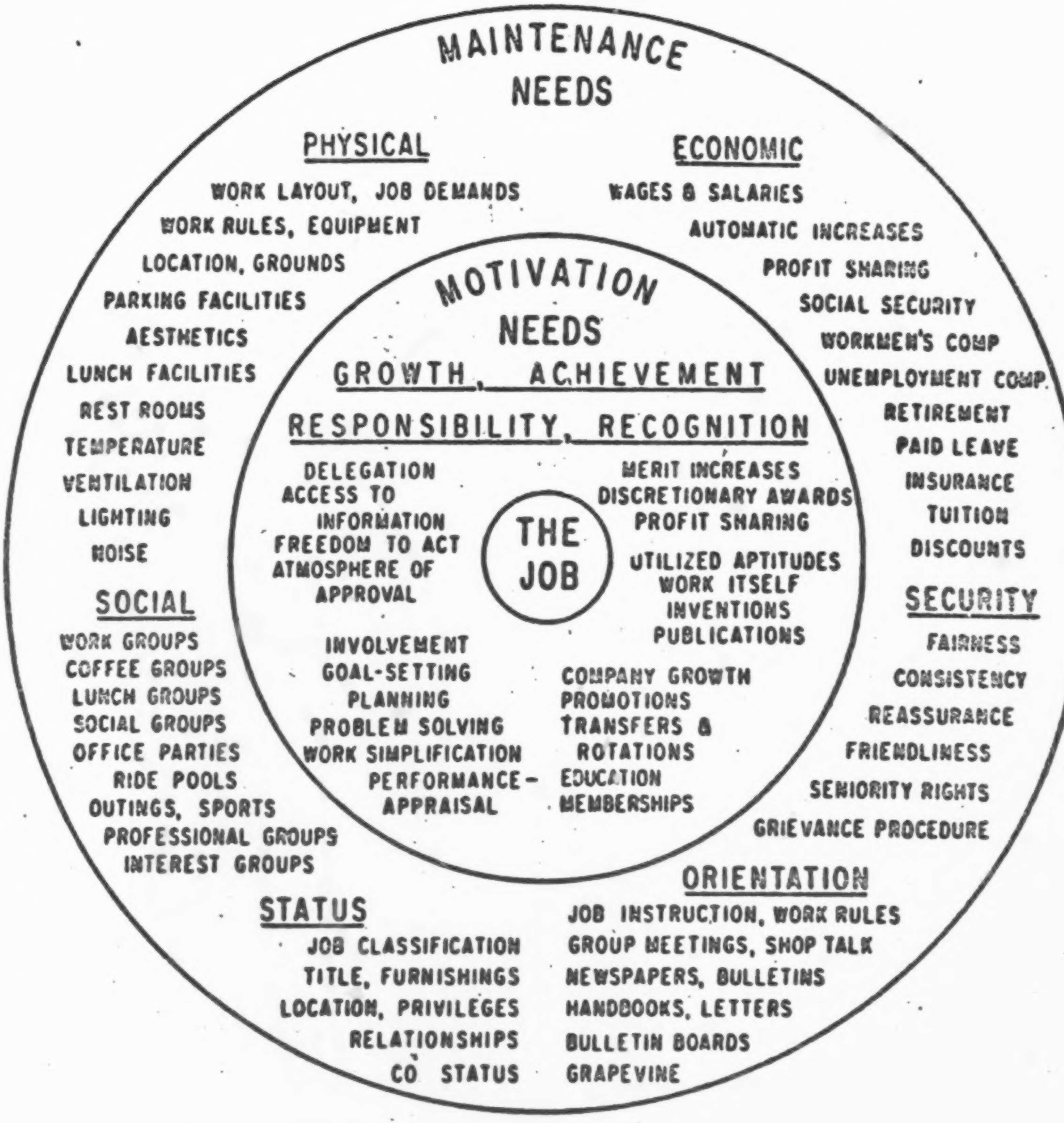
4. ANALYZE THE EFFECTIVENESS AND THE RESOURCES CONSUMPTION OR COSTS OF THESE ALTERNATIVE SUB-OBJECTIVES.

5. SELECT AND STATE THE PREFERRED SUB-OBJECTIVES.

6. REPEAT THE FOREGOING PROCESS TO MINIMIZE INCONSISTENCIES OF THE SUB-OBJECTIVES WITH EACH OTHER AND WITH THE OTHER BROADER OBJECTIVES.

7. STATE THE FINAL SUB-OBJECTIVES

STATEMENT OF BROAD CORPORATE OBJECTIVE OR PURPOSE DERIVES FROM THE NEEDS, VALUES AND MOTIVATIONS OF SENIOR EXECUTIVES AND RECOGNIZES BOTH INTERNAL AND EXTERNAL LIMITATIONS.


MAINTENANCE NEEDS
PHYSICAL
WORK LAYOUT, JOB DEMANDS
WORK RULES, EQUIPMENT
LOCATION, GROUNDS
PARKING FACILITIES
AESTHETICS
LUNCH FACILITIES
REST ROOMS
TEMPERATURE
VENTILATION
LIGHTING
NOISE
ECONOMIC
WAGES & SALARIES
AUTOMATIC INCREASES
PROFIT SHARING
SOCIAL SECURITY
WORKMEN'S COMP
UNEMPLOYMENT COMP.
RETIREMENT
PAID LEAVE
INSURANCE
TUITION
DISCOUNTS
MOTIVATION NEEDS
GROWTH, ACHIEVEMENT
RESPONSIBILITY, RECOGNITION
DELEGATION
ACCESS TO INFORMATION
FREEDOM TO ACT
ATMOSPHERE OF APPROVAL
MERIT INCREASES
DISCRETIONARY AWARDS
PROFIT SHARING
THE JOB
UTILIZED APTITUDES
WORK ITSELF
INVENTIONS
PUBLICATIONS
INVOLVEMENT
GOAL-SETTING
PLANNING
PROBLEM SOLVING
WORK SIMPLIFICATION
PERFORMANCE-APPRAISAL
COMPANY GROWTH
PROMOTIONS
TRANSFERS & ROTATIONS
EDUCATION
MEMBERSHIPS
SOCIAL
WORK GROUPS
COFFEE GROUPS
LUNCH GROUPS
SOCIAL GROUPS
OFFICE PARTIES
RIDE POOLS
OUTINGS, SPORTS
PROFESSIONAL GROUPS
INTEREST GROUPS
SECURITY
FAIRNESS
CONSISTENCY
REASSURANCE
FRIENDLINESS
SENIORITY RIGHTS
GRIEVANCE PROCEDURE
STATUS
JOB CLASSIFICATION
TITLE, FURNISHINGS
LOCATION, PRIVILEGES
RELATIONSHIPS
CO STATUS
ORIENTATION
JOB INSTRUCTION, WORK RULES
GROUP MEETINGS, SHOP TALK
NEWSPAPERS, BULLETINS
HANDBOOKS, LETTERS
BULLETIN BOARDS
GRAPEVINE

**Employee Needs:** Effective job performance depends on the fulfillment of both motivation and maintenance needs. Motivation needs include responsibility, achievement, recognition and growth, and are satisfied through the media grouped in the inner circle. Motivation factors focus on the individual and his achievement of company and personal goals. Maintenance needs are satisfied through media listed in the outer circle under the headings of physical, social, status, orientation, security, and economic. Peripheral to the task and usually group administered, maintenance factors have little motivational value, but their fulfillment is essential to the avoidance of dissatisfaction. An environment rich in opportunities for satisfying motivation needs leads to motivation seeking habits, and a job situation sparse in motivation opportunities encourages preoccupation with maintenance factors.

# ACTION/PRIORITY PLAN

TITLE: Air Conditioning and Refrigeration Service Manager
NAME: Charles Ellis
DATE: January 28, 1965

| KEY AREA | PRESENT FACTORS LIMITING PERFORMANCE | ACTION TO BE TAKEN | SUPPORTING ACTION TO BE TAKEN | COMPLET DATE |
|---|---|---|---|---|
| Service | - | To realize service sales = $370,000 | | March 31, 1965 |
| Sales | | To realize gross markup = $15,000 | | March 31, 1965 |
| Labour Utilization | Detail paper work - no time for performance in other areas | Hire and train a dispatcher.<br>To develop standard procedures including the processing of billings and service calls. | Approval by P. Bevan with F, Rosenboom | March 31, 1965 |
| Invoicing | No standard procedures | To develop services report forms and standard procedures for service invoicing | With F. Rosenboom Approval by P. Bevan | March 31, 1965 |
| Marketing | Answering service phone calls | Priority selection prospects for service contract proposals and submit proposals. | Approval by P. Bevan | March 31, 1965 |
| Equipment | Limited availability of trucks - poor condition.<br>Lack of complete tool equipment in trucks.<br>Present vacuum pump units too small | Obtain new - incl. truck<br>Record present stock - estimate requirements.<br>Obtain engineering specifications on pumps. | Approval by P. Bevan.<br>Purchasing to obtain best price on truck and equipment. | |

# ORGANIZATION CHART

## DEPARTMENT OF UNIVERSITY EXTENSION AND ADULT EDUCATION

## UNIVERSITY OF MANITOBA

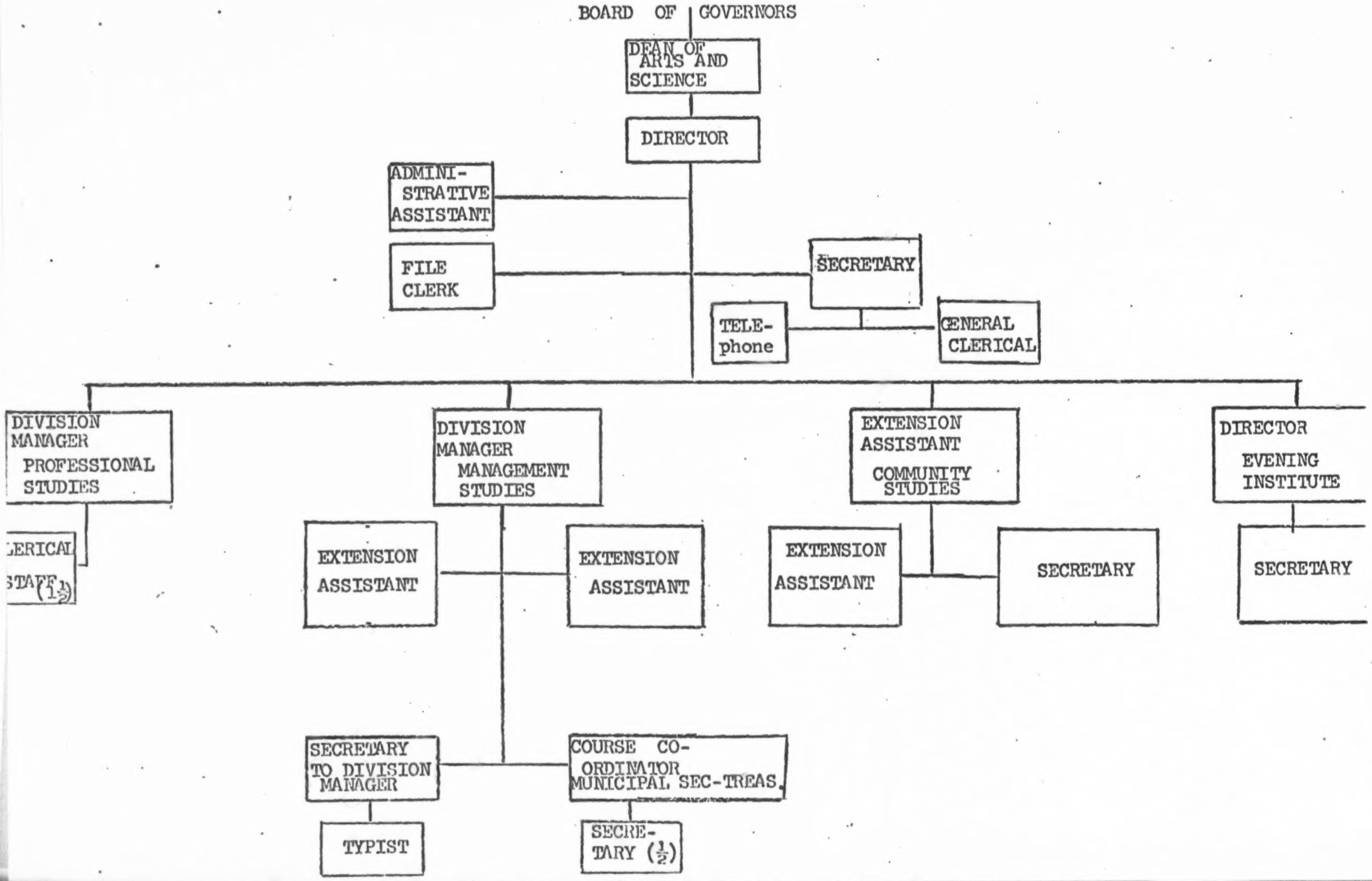

BOARD OF GOVERNORS
DEAN OF ARTS AND SCIENCE
DIRECTOR
ADMINI- STRATIVE ASSISTANT
FILE CLERK
SECRETARY
TELE- phone
GENERAL CLERICAL
DIVISION MANAGER PROFESSIONAL STUDIES
ERICAL STAFF (1½)
DIVISION MANAGER MANAGEMENT STUDIES
EXTENSION ASSISTANT
EXTENSION ASSISTANT
SECRETARY TO DIVISION MANAGER
TYPIST
COURSE CO- ORDINATOR MUNICIPAL SEC-TREAS.
SECRE- TARY (½)
EXTENSION ASSISTANT COMMUNITY STUDIES
EXTENSION ASSISTANT
SECRETARY
DIRECTOR EVENING INSTITUTE
SECRETARY

EXHIBIT II

## COMMUNITY STUDIES DIVISION COURSES

| | | |
|---|---|---|
| 2 | Family Life Seminars | |
| | Conference: Growth, Sloth or Both? | CPAC |
| | Practical Course in Art Education | On Campus, province-wide |
| | Cree Language Course | On Campus, province-wide |
| 1 | Canadian Family, Seminar | Birtle |
| | Law, Money and the Business of Farming | Harte |
| 4 | Rural Leadership Training Seminars | Regional |
| | Counselling | The Pas |
| | Rural Sociology | Harte |
| | Cross-Cultural Relations | Kenora |
| | Town Study | Dominion City |
| | Counselling & Guidance for Festival of the Arts | Souris |
| | Survey of Needs in Education | Steinbach<br>Ste. Anne<br>Portage<br>Pine Falls<br>Pinawa<br>Flin Flon<br>Emerson<br>Dauphin<br>Russell<br>Birtle<br>Gilbert Plains<br>Carman<br>The Pas |
| 3 | Rural Leadership Study Seminars | Province Wide<br>2 Social Economic Change in Rural Areas |
| | | The Changing Position Scene |
| | Welfare Agency Volunteer Training | on Campus |

# EVENING INSTITUTE COURSES

. . . And All That Jazz
Conservation for Thoughtful People
Dialogue I - The Vocabulary of Religious Dialogue
Effective English
Family Living in Modern Society
French Conversation I
French Conversation II
French Conversation - Advanced
French - Intensive Course in Spoken French
French - Intensive Course in Spoken French
(Intermediate)
German Conversation I
German Conversation II
Hebrew Conversation I
How to Read Faster and Better
Interior Decoration
International Relations
Italian Conversation I
Italian Conversation II
Law for the Layman
Literature and Computers
Magazine Article Writing
New Mathematics for Parents
The Occult Science of Palmistry
The Pre-History of Manitoba
Psychic Sciences
Satire
Spanish - Beginning
Spanish - Intermediate
Television and Radio Drama
Twentieth Century Art
Understanding the Night Sky
Your Investments in Securities

EXHIBIT IV

# THE UNIVERSITY OF MANITOBA

## DEPARTMENT OF UNIVERSITY EXTENSION AND ADULT EDUCATION

## HISTORY AND DEVELOPMENT

**1936**

EVENING INSTITUTE OFFERS NON-CREDIT GRANTING COURSES TO ADULT CITIZENS OF WINNIPEG.

OTHER EXTENSION EDUCATION WAS CO-ORDINATED BY THE GENERAL FACULTY COUNCIL'S COMMITTEES ON PUBLIC LECTURES PLUS A SUBSTANTIAL CONTRIBUTION BY THE FACULTY OF AGRICULTURE.

**1941**

ADULT EDUCATION OFFICE ESTABISHED. DIRECTOR OF THE OFFICE WAS SECRETARY OF THE ADULT EDUCATION COMMITTEE -- A COMMITTEE MADE UP OF FACULTY REPRESENTATIVES

175 STUDY GROUPS FORMED BY APRIL 1944, THROUGHOUT 59 COMMUNITIES IN MANITOBA BUT FAILED DUE TO LACK OF LEADERS.

DIRECTOR BECAME REGIONAL AGENT FOR THE NATIONAL FILM BOARD RESPONSIBLE FOR PUBLIC INFORMATION FILM PROGRAMMES.

ARTS AND CRAFTS DIVISION ESTABLISHED.

DRAMA DIVISION ESTABLISHED.

**1944**

ARTS AND CRAFTS DIVISION CEASES TO EXIST.

FILM LIBRARY )
DRAMA DIVISION ) CONTINUED ACTIVE
EVENING INSTITUTE )

(EVENING INSTITUTE CO-ORDINATED DIRECTLY BY THE GENERAL FACULTY COUNCIL.)

**1944**

CARNEGIE GRANT FOR RURAL COMMUNITY DEVELOPMENT NOT RENEWED.

DIRECTOR RESIGNS

PRESIDENT'S REPORT MAKES NO MENTION OF OFFICE.

EXHIBIT IV

| | |
|---|---|
| 1945 | ROYAL COMMISSION ON ADULT EDUCATION FORMED |
| 1947 | REPORT OF COMMISSION PRESENTED. |
| 1949 | PRESENT DEPARTMENT CREATED. "DEPARTMENT OF UNIVERSITY EXTENSION AND ADULT EDUCATION"; DIRECTOR HIRED.<br>OPERATING BUDGET - $16,000.00.<br>UNIVERSITY MOVES FROM DOWNTOWN WINNIPEG AREA TO FORT GARRY CAMPUS -- EVENING INSTITUTE REMAINS CENTRAL. |
| 1952 | RESPONSIBILITY FOR THE CONDUCT OF CORRESPONDENCE COURSES FOR CREDIT WAS TRANSFERRED FROM ARTS AND SCIENCE TO THE OFFICE. |
| 1953 | AUDIO-VISUAL DIVISION BEGAN OPERATIONS -- N.F.B.'S PROVINCIAL LIBRARY. |
| 1955 | TV INTRODUCED IN MANITOBA CAUSES POPULAR "FEBRUARY" LECTURE SERIES TO BE CANCELLED. |
| 1961 | ALL FACILITIES TRANSFERRED TO FORT GARRY CAMPUS -- REGISTRATIONS DROPPED. |
| 1962 | RESPONSIBILITY FOR THE CONDUCT OF CREDIT GRANTING EXTENSION COURSES TRANSFERRED TO A NEW UNIT "THE EVENING AND SUMMER SESSIONS". |
| 1964 | PRESENT DIVISIONAL ORGANIZATION ADOPTED. |
| 1966 | CANADIAN ASSOCIATION FOR ADULT EDUCATION FORMED.<br>DIVISION OF COMMUNITY STUDIES FORMED. |

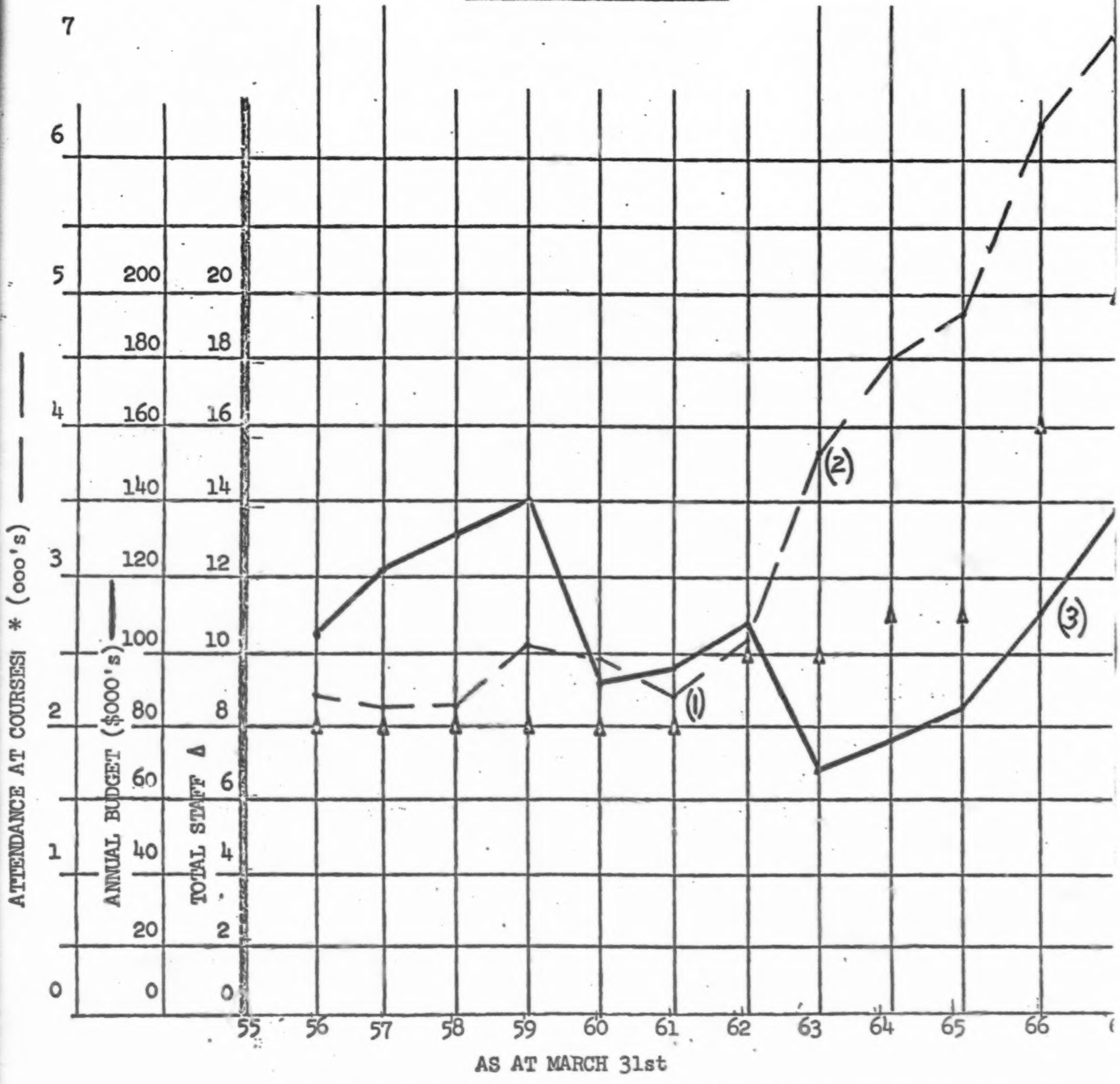
EXHIBIT V

## GRAPH SHOWING GROWTH OF

## ENROLLMENT, BUDGET, AND STAFF

## DEPARTMENT OF UNIVERSITY EXTENSION AND ADULT EDUCATION

## UNIVERSITY OF MANITOBA



* INCLUDES ATTENDANCE AT COURSES PRESENTED BY THE MANAGEMENT STUDIES DIVISION, PROFESSIONAL ADVANCEMENT, COMMUNITY STUDIES EVENING INSTITUTE ONLY - EXCLUDES CREDIT GRAINTING COURSES.

(1) MOVE FROM DOWNTOWN WINNIPEG TO CAMPUS AT FORT GARRY.
(2) INCREASE IN REGISTRATIONS DUE LARGELY TO DIVISION OF MANAGEMENT STUDIES.
(3) CLERICAL STAFF, REGULARLY EMPLOYED BUT CLASSIFIED AS CASUAL ASSISTANCE RECLASSIFIED

## PROFESSIONAL STUDIES DIVISION

| FACULTY | EXTENT OF EXTENSION PROGRAM | FORM OF LIAISON | COMMENTS |
|---|---|---|---|
| 1. AGRICULTURE | ONE CERTIFICATE COURSE | REPRESENTED ON PLANNING COMMITTEE | FACULTY OF AGRICULTURE IS USED TO RUNNING ITS OWN AD HOC PROGRAMME AT LITTLE OR NO COST TO SPONSORING GROUPS OR PARTICIPANTS. |
| 2. CLERGY | SIX PROGRAMS | REPRESENTED ON PLANNING COMMITTEE | THE PROGRAMMING FOR CLERGY EXISTS IN THIS DEPARTMENT BECAUSE WE SOUGHT IT OUT. |
| 3. DENTISTS | SIX PROGRAMS | LIAISON WITH FACULTY REPRESENTATIVE | INITIATIVE RESTS WITH THE FACULTY, THE DEPARTMENTAL FUNCTION IS LITTLE MORE THAN ADMINISTRATIVE. |
| 4. ENGINEERS | ELEVEN PROGRAMS | REPRESENTED ON PLANNING COMMITTEES | THIS DEPARTMENT MADE A SERIOUS ATTEMPT TO MEET WITH INSTRUCTORS BUT OUR ROLE WAS SEEN AS BEING LARGELY SERVICE. |
| 5. HOME ECONOMICS | TWO PROGRAMS | REPRESENTED ON PLANNING COMMITTEE | NO COMMENT. |
| 6. NURSES | THREE PROGRAMS | LIAISON WITH REPRESENTATIVE | THE EXTENSION DEPARTMENT PLAYS AN ADMINISTRATIVE AND FACILITATIVE ROLE ONLY. |
| 7. SOCIAL WORK | SIXTEEN PROGRAMS | REPRESENTED ON FACULTY COMMITTEE | THE DEPARTMENT IS SEEN BOTH AS EDUCATOR AND IDEA-MANAGER --- MEETINGS (HELD) WITHIN THE FACULTY COUNCIL OF THE SCHOOL: AND OCCASIO CONSULTATIONS WITH THE SOCIAL AUDI AND WELFARE COUNCIL STAFF |

2

## DISCUSSION

The six points that Paul White and I have put on the board are an attempt to present in capsule form, some of the more pertinent problem areas that have come out of our brief exposure to these two extension operations. The reason they appear to be somewhat abstract is that we want the discussion to be as meaningful as possible for each of you. Therefore, rather than deal with specific and detailed administrative aspects which might be relevant to George Boyes or Stuart Tweedie in their own institutions.

POINT ONE SHOULD THE RESPONSIBILITY FOR PROGRAMME DEVELOPMENT AND ADMINISTRATION BE SEGREGATED IN THE ORGANIZATION? You will recall, both Paul and I indicated that it was essentially not segregated presently in both of the activities that we looked at.

SECOND QUESTION. WHAT ARE THE APPROPRIATE CRITERIA FOR GROUPING COURSES AND FOR ALLOCATING RESPONSIBILITIES FOR THE DEVELOPMENTAL ASPECTS OF THE ACADEMIC PROGRAMME? SHOULD ALL DEGREE PROGRAMMES BE PUT TOGETHER? SHOULD CERTIFICATE AND NON-CERTIFICATE PROGRAMMES BE GROUPED? SHOULD NON-CREDIT COURSES BE SEGREGATED OUT FOR INDIVIDUAL ATTENTION? WHAT ARE THE CRITERIA THAT ARE USED, EITHER CONSCIOUSLY OR IMPLICITLY IN THE DECISIONS THAT WE MAKE ABOUT GROUPING AND ALLOCATING RESPONSIBILITY TO SENIOR INDIVIDUALS IN OUR RESPECTIVE DIVISIONS OR DEPARTMENTS.

THIRD QUESTION. HOW CAN THE ORGANIZATION STRUCTURE PROVIDE FOR THE MOST EFFECTIVE LIAISON AND COORDINATION WITH UNIVERSITY DEPARTMENTS? This from our discussions is obviously a major problem area, which impinges on the discretion and authority of the director of extension and which impinges on the nature of the academic programme when it's finally developed and launched.

QUESTION NUMBER FOUR. SHOULD THE EXTENSION DIVISION HAVE THE STATUS OF A FACULTY WITH BROAD AUTONOMY OVER ITS AFFAIRS?

AND NUMBER FIVE. IS IT POSSIBLE TO LOCALIZE AUTHORITY AND ACCOUNTABILITY IN EACH SENIOR POSITION, INCLUDING THE POSITION OF DIRECTOR, IN VIEW OF THE HIGH LEVEL OF LIAISON AND COORDINATION PRESENTLY REQUIRED WITH MANY UNIVERSITY DEPARTMENTS? IS IT,IN FACT, POSSIBLE TO IDENTIFY SPECIFICALLY THE SCOPE, THE DISCRETION, THE DECISION-MAKING AUTHORITY OF SENIOR PEOPLE WITHIN EXTENSION OPERATIONS, OR MUST THIS AUTHORITY AND THE ACCOUNTABILITY FOR THE RESULTS OF EXTENSION ACTIVITIES, BE A WIDELY SHARED KIND OF ACCOUNTABILITY AND AUTHORITY?

AND NUMBER SIX. CAN THE ROLE OF THE DIVISION BE DEFINED MORE CLEARLY?

QUESTION # 1

Harold Baker: I'll just speak from a brief experience in my own case, we had administration more or less tied to about eight people until July 1st, and at that point established a department of administration within the division. And we're finding so far at least that it's working very well,that is, it relieves these people although they have authority and responsibility for a chunk of budget. It still relieves them of the control function of all details concerning facilities and bookkeeping, etc. Essentially, all they have to do is phone down the hall to get this done so my answer is yes, I think it's worth thinking about.

Bill Benn: What is the size of your operations relative to some of the others?

Harold Baker: Forty staff members in total.

Gerard Lafreniere: Can you explain the full extent of the question?

Bill Benn: At present, in the division of extension in Toronto, and to a major extent in Manitoba, the senior individuals in the extension operation have a two-fold kind of responsibility. They have a responsibility for programme content in conjunction with people in university departments. But they also have a responsibility for overseeing and directing such things as registration, the production and dissemination of public relations material, the collection and refund of fees, the arrangements for teaching facilities with the universities, the recruitment of teachers, and other such non-professional or non-academic kinds of activities. In Toronto there are four or five senior people reporting to the director who carry both of these kinds of responsibilities. The question is, is this the best way to do it, or are there some advantages in pulling out this administrative work from these relatively high level people and letting them concentrate on the academic development aspects of the job? Would this approach get a better utiliaation of relatively high level skills? Are there strong reasons for keeping administrative work decentralized, as it is now, or are there advantages in drawing it back into a secretariat or central department? Now,U. of Manitoba extension has some of both as I recall. They do have some centralization of this activity, but, predominantly, it's decentralized into three or four of the major components in the division. Harold has suggested that he has found that there may be advantages in considering the segregation of these two major kinds of activities and the centralizing of these administrative, to some extent, routine functions. George Boyes raises a point here with respect to the high level of counselling that is involved in admittance, in advising people as to the appropriateness of various courses, which may be difficult to take away from the individuals who are responsible for the programme development content.

George Boyes, U. of Toronto: Well, I think that the senior person, the person in charge of the section, is certainly involved with the budget for his programme, and can't help but be, any more that I can be for the whole Division. But that doesn't divorce me from the academic planning. It's just a fact of life, that the person who is working on the content is freed of a lot of detail that I think your remarks indicate he isn't freed of.

Bill Benn: Do you mean it isn't quite as we have depicted it?

George Boyes: Well, no. There's somebody in every section who's responsible for registering and collecting fees. Now as far as possible we've had all fee collections removed from us. It is done by the bursar's office, but unless we're going to say to people at night, wait till tomorrow and register, or have the bursar's office open all night, we will have to take money at night. There is a night supervisor whose job it is to collect all the money that's paid in various buildings at night, and it is taken with police escort to the central office at Simcoe Hall. We don't care what happens to it after that. But we want the collection of money off our hands. This same person looks after other things before the money's all collected. Not only is he collecting money but he's doing other jobs at night, such as handing out calendars or something else that is needed. We operate in fourteen or fifteen buildings on most nights of the week, so that he is travelling around and co-ordinating all this. And the man who's planning the course has nothing to do with this. I don't even know if he knows what's going on sometimes, and I've found that he may not be considering some of the staff under him enough if he doesn't know what's going on.

Stuart Tweedie:U. of Manitoba: In small measures this separation exists in Manitoba, particularly in the matter of collection of fees because we have managed to get into the position where close to 90% of our registration is advanced by mail, and consequently it can all be handled in a unit of administration not related to the programme development or the men who actually run the course. I'm not too worried about that. I'm trying to give the heads of all the departments extension assistants, whose primary job is to handle a lot of this detail. The handling of all the details, getting the rooms, etc., is not as tightly allocated as I now realize it should be.

Gerard Lafreniere: How many departments within the extension division have an administrative person, that is, a person who is exclusively assigned to the administration, not of collecting fees, but the administration of the office as such? Or is it part of the normal work load of the various officers in the departments?

George Boyes: Well, each of our sections has a general office, and a head girl there who looks after work load and so forth. And all our business manager does really is assist her if she needs it. But his job is knowing all about equipment that is available and getting prices, such as on envelopes. There was a time when each section bought its own 10,000 envelopes every time it needed some. Now the business manager will buy 150,000, not all of the same letter heading but we get it all in the same order. And this is the kind of thing he looks after.

Angela Armitt: U. of Western Ontario: We have the same setup, an administrative assistant who looks after, for example, all advertising, all ordering of supplies, all checking of machines, and so on is carried out by one single person. And fee collecting is done by the Registrar's Office -- we don't touch that at all.

Bill Benn: Where should the role of counselling be placed?

George Boyes: Again, in each section, I think. I don't see how the counsellor for professional engineers will be helpful to the man starting a B.A.

who doesn't know how the University works at all.

Bill Benn: Gordon, did you have a point?

Gordon Selman: Yes, certainly, very much related to the last question you asked, which I think is pretty telling. It is a matter of degree, and of definition of what you mean by administration etc. You draw the line one place and you create certain kinds of problems about the flow of information. You get some kinds of delegation between a professional person and his secretary on these kinds of things that we talked about. What do you do to the system when you separate, in a sense, the registration, and that sort of administrative detail, from the supervisor who has to make decisions as to whether a course will be carried with the number of people who turn up at the class, and what extra burdens do you create in the area of passing information? Harold's phone call down the hall may turn into a hundred phone calls. These are the sort of questions we're trying to struggle with too, and I'm glad that Harold made this decision, and I think we can all learn from the experience of this kind of separation. We are all accustomed I think to some sort of separation, in the hiving off of this kind of thing to secretarial and clerical help. But it seems to me that the big question is where do you draw the line in terms of what you gain and the extra work you get for yourself in having to make information available for other people, etc. And the counselling pretty well hones in on the difficulty.

Harold Baker: I would like to comment here that I would not question the counselling myself. I think it belongs with the programming people. But the basic decision that we made was based on the problem of having eight or ten people all doing similar things in different ways, for example, all arranging meals and banquets with one food service building and all making phone calls and having to be told the same story by the manager over there.

So we're streamlining. The main thing I would say was the problem of having $10, $12, $15 thousand people doing what $5 and $6 thousand people could do as well. And I think the economics of it was the basic thing. And permitting the people most qualified to spend the largest portion of their time building quality into the content of their program, while realizing you had to build in this extra machinery to get the liaison to make sure that there's quality in the total picture.

Bill Benn: Thank you very much Gordon and Harold. I was going to ask for a capsule comment on this aspect of it. I think you have provided that without my asking for it.

Question # 2

Paul White: What are the appropriate criteria for the grouping of courses and for allocating responsibilities for the developmental aspects of the academic programme? We saw in the case of Manitoba a breakout into four areas, the evening institute, the community programmes, management studies and professional studies. And in the case of Toronto, such major groupings as coordinator of business and professional courses, assistant director non-degree courses, assistant director degree courses, coordinator engineering courses, and coordinator business and professional correspondence courses. The question asks what are the appropriate criteria. I wonder if someone would like to comment on the criteria for breaking out the overall responsibilities of the extension department at that first level of organization. What are the factors that have an influence on the way in which the organization is broken out?

Gordon Selman: What was really uppermost in my mind was perhaps not a point that might well come out first, but it was this. One of the problems I'm finding in trying to make sense out of this whole thing, is that at the same time that we're trying to make an organizational pattern that is sensible in itself, there is also a very interesting little game going on, on the campus, with respect to the degree of decentralization that will come about in the administration of extension work. Will the faculty of engineering run its own extension programme rather than do it through the extension department? Well, at the moment we have a man on our staff who does the continuing education work in engineering. He's advised by a policy committee in the faculty of engineering. Now, it's a pretty important matter to me at the present time, in terms of overall strategy, that I be as close as possible to that man who's doing the engineering work, in order that I can try to be sensitive to the relationship. Now, I might otherwise think it would be sensible to create a head for the various professional areas in the department and have one man who, in the line of authority, would be between me and the guy who's doing the engineering programme. But, on the other hand, I have the feeling that the relationship between our department and the faculty of engineering is so tender and so in the area of development at the present time that I am reluctant to create that extra stage between that man and myself. This wasn't a direct answer to your question but it was the thought that was in my mind in thinking about organization and the criteria needed to be taken into account in developing it.

George Boyes: In our case, it's the size of the operation; is there enough of it to involve a full-time coordinator or a part-time coordinator? That's why professional courses are grouped as professional courses and out of that we can pull anything. Business is moving out of that as quickly as it can be arranged. It won't be business and professional, it will just be other professional courses. Nursing is coming quite close to requiring a coordinator.

Paul White: What pressure or what influence has been brought to bear by the faculty being serviced, for the extension department to appoint an individual to look after their own particular programme? Is this a criterion which has been used?

George Boyes: It is in some cases. When we started Nursing it was pressure from all directions on our School of Nursing to do more than they were doing, and they felt they couldn't do a lot of it so they came to us. But we had no notion of starting into Nursing until we were asked by Nursing to do it. And now we have about 5 other professional faculties thinking about whether this is a good idea for them or not. We're having dozens of requests from outside groups for a Bachelor of Commerce or Mechanical or Electrical Engineering Programmes or Social Work. All kinds of things like this are coming from the students, but I think it's from the professional society that the pressure is felt the greatest at the university, not from the students. For one thing, it's hard to evaluate the amount of pressure. If you get a dozen phone calls asking for the same thing, and you're not giving it, it seems as if you've just had a hundred, you know. But when it comes from a professional group saying that they, and their association see a great need for something or other, or when it comes from a minister of the provincial government this is a more measurable kind of pressure, really.

Gordon Selman: Certainly some of the kinds of things that you take into account are the structure of organization of the university. If you're setting up somebody to do programmes in the field of engineering, then you do it that way for two reasons. One, because many of the people who are most strategic in terms of teaching the programmes for engineers come from a certain faculty of engineering, and in turn, you're dealing with a particular group of graduates, a professional group downtown. So subject matter, and the existing structure of the university outside the department, will be some of the things you will take into account in deciding which courses to put onto certain people.

Harold Baker: One of our dilemmas on this question is the trouble we're having with what might be called 'interdisciplinary' interests these days.

The extreme for us might be the area of community development, a pretty broad area where you draw from many places for instructors. But the trouble we're also having is right on Gordon's line of the engineers, for example, becoming interested in sociology. Or the agrologist, who for many years drew completely from the college of agriculture, now puts high priority on administration, as being a weakness, and they want people from the college of commerce. So we're getting fouled up organizationally by getting these crosscurrents. The problem is how to deal with them.

Paul White: As soon as you become specific in an area you have a requirement to move into interdisciplinary responsibility at the same time.

Jindra Kulich, U. of British Columbia: Isn't the Key issue that you either programme for clientele or you programme in a programme area. I think we do both at U.B.C. In the professional area we programme for engineers. Now, this can be an engineering course, it can be a law course in contractual law for engineers, which was put on by the engineering division, not by the law people. We don't have administration for engineers, which again would be appropriate to the engineering programme, and so in any other professional subdivision. Then you have the overall programme for the general public where you have crosscurrents.

George Boyes: The most glaring example of this with us is data processing. Every professional group wants to know how to use data, and so we give the course and they all come to it, unless there is something more specific.

Gordon Selman: And yet sometimes it seems to be more effective to put that course on as data processing for engineers or data processing for somebody else. You then make use of the machinery of their professional association, etc. And somewhere we've got to find a reasonable arrangement.

George Boyes: The engineers are the hardest to deal with. We have had 2 or 3 programmes now on managing the engineering function.

Stuart Tweedie: That's a nice decision to make isn't it? If a man on the other side of your desk is an engineer or a manager? I think you have to put it to him very strictly: Where are you in your company hierarchy, and please define your interests much more specifically than you've done up to the moment, or you can't organize a programme properly.

Paul White: It's pretty difficult to do in some cases, just to define your role within your own environment from a user standpoint.

Stuart Tweedie: In general one of the standard reactions is to make sure the man who comes to us, either as an individual or representing community, knows exactly what he wants, because what his real requirement is may be quite different from his verbalization of it.

Paul White: What about the aspect of organizing for rural programmes? Is there any other experience? We touched, in the Manitoba case study, on the community studies division, which is really the only one there that is primarily aimed at mounting courses for the rural community. I was wondering if anybody else had an experience of organizing for programmes outside their major metropolitan area, and how they handled it.

Harold Baker: This may be approaching it in a negative way, but the thing we decided not to do, was to organize on the basis of client group. We used to be organized that way, you know, adults, youths, farmers, engineers. And this goes back to my former statement that I don't think any more than any one occupation or place in society,in the family or in the community, dictates the kind of learning people are now or in the future, will be interested in.

What we tried to do, (and I don't know how you do it ideally) was to develop flexibility into the thing so that you're never stuck, with a department of a certain name, for instance, that ties you to a certain clientele group. I think it's better to be tied to a subject matter that you can adjust to the clientele who are interested. I have a bias here, because I've been involved most of my life in rural oriented programmes, but more recently I've been involved in urban interests and I've decided personally, without very much validation, perhaps, that fron now on, it's unrealistic, and maybe even unwise, to base structure and programming on a rural-urban split. For one thing, they're split enough without continuing it. The second thing is, I don't think there's that much difference in their programme interests. There's a difference in the content you feed in, maybe, depending who the group is. But we've had farmers and businessmen sitting side by side looking at, you know, where the social-economic development is going.

Paul White: I would understand from your comment, then, that you do not have a person analogous to the head of community programmes such as we saw in the Manitoba case; that if you are mounting a rural programme it's drawn from your other personnel and their particular area of expertise or responsibility.

Harold Baker: We have a rural oriented person, that we feel is more comfortable for placing with a group of farmers as opposed to businessmen from Main Street.

Paul White: It's a secondary consideration. Do you care to comment, Professor Tweedy?

Stuart Tweedie: I have a slightly different approach which is in part dictated by the fact that Manitoba is very wealthy and strong. The other two prairie provinces are considerably more evenly spread on the ground.

We're not. We have a big urban centre, a few much smaller ones, and then a hinterland, the nature of which isn't quite clear yet. It's in that hinterland that we are vitally concerned because some very disturbed people are living there and trying to make economic and social decisions. The way we're running it is almost the classical way the Overstreets did. We're sending a man in to whistle. In other words, we're not rushing it. We're trying to get some of these communities to think through to a definition of what they believe their primary problems are, and then at that point, we send in people from the faculty competent to discuss these things. Now this runs right into the question of the interdisciplinary approach to such matters. We're working with an interdisciplinary reasearch committee to develop guidelines for the creation of isolated northern communities which right now don't exist. We solved this in part by my saying to the head of the newly created department, since the interdisciplinary approach is now quite common on campus, I would advise that you develop this point of view within the extension division, and more and more going on to interdisciplinary confrontations within the departments. For instance, in the city of Brandon, 150 miles west, which is a reasonably fair sized community, you find that the dentists want some instruction in the legal sanction which might be applied to them under certain conditions. All right, who runs such programmes? And that gives me a big job-- who has the primary responsibility for operating on behalf of a professional view?

Paul White: Any other comments on this point?

Gerard Lafreniere: I just want to know if I've understood what has been said. Did we say that the appropriate criteria for grouping of courses would be the nature of the programme, in other words, the grouping of courses is determined by the nature of the programme: for example, the non-credit as opposed to the credit, and within the credit, the specialized fields, engineering as opposed to faculty of arts?

Paul White: I don't know. It seems to me that, if you get back to your priorities, in saying that particular programmes are more important than others, you might want to say that urban oriented programmes are more important than rural programmes, or whatever rationale you'd like to apply, be it the simple decline of the rural areas, and the growth of the urban areas. So that you will service the rural by way of what you are developing in the urban communities.

Bill Benn: I think it's also fair to say that the question was put without any feeling that there are any obvious answers. It's a very complex problem. I think George Boyes has another dimension, and that is, what is the significance of the locational factors, the development of extension at these constituent colleges. Do these introduce a new element of consideration for how you organize?

George Boyes: Well, they do in a way. I notice that reference was made to the fact that a limited programme is provided at these colleges. They're forty-two miles apart, these two colleges, byt they're still in the metro area, and to give everything that we were giving at one or both of these centres would be terribly extravagent, and terribly difficult. They are general arts and science colleges, so they have no other faculty. They don't have law or engineering, so we have to move people out to them. And we've found that extremely difficult, so that what goes on at the colleges depends partly on the availability of staff. It's much harder for a man to travel twenty miles or so to give his lecture at night.

Stuart Tweedie: May I ask a question of our technical advisor? Is it right or is it no longer right that grouping of courses which have a recognizably homogeneous aspect is an effective basis or are there other factors?

George Boyes: What kind of homogeneous aspect?

Stuart Tweedie: Well, professional is the favourite one. Is this too rigid and restricted an approach to take?

Paul White: Let me turn that one around a little bit and ask the group what effect people have on that, that you have in your extension department, the abilities of the people that you have.

Stuart Tweedie: Well, if the man clearly related to the suggested course is too busy, do you give it to someone else, just to get it done? You're doing more harm than good.

Knute Buttedahl: Well, this will go back again to your departmental objectives. I mean, if you've got certain targets in terms of numbers of programmes or clientele you want to serve, etc. you have to be able to make a decision about whether or not you must respond to this need to put this programme on or not, because the man responsible for it already has his plate full, you know, again objectives - coming back to the foundation stone for all organizational management. This helps you to make this kind of decision.

Paul White: I think part of this problem is certainly an assessment of the risk involved in taking that programme and alloting it to somebody who does not have the required or relevant experience for it, and the eventual dissatisfaction, either on the users side or the faculty side, or the extension department's side, with the outcome of that particular programme. I think, if you like that as a management decision, that's a true management decision as to where you allocate work.

Stuart Tweedie: Well, I make it on the basis of a homogeneous delegation of responsibility before I even start delegating authority. And if the plate becomes too full, I simply start the question upstairs and say I need more staff.

George Boyes: But if you can get it in time.

Stuart Tweedie: I was lucky and found a man in two days.

Gordon Selman: He probably asked for the courses in the first place.

Paul White: There's got to be some catch to that somewhere. Could we pass on to the third point? Bill would you like to continue?

Bill Benn: The third point asks how the organization structure can provide for more effective liaison with university departments. Paul described some of the elements, some of the factors, involved in coordination within the environment at Manitoba. He tentatively concluded that some forms of liaison appear to be more effective than others. What can be done at the stage of structuring the division organization itself to facilitate this factor of coordination? Fred, how about some observations on this point?

Fred Terentiuk: Well, I've been thinking about what you people are saying here and also something you people said yesterday. I was interested in hearing you use the word catalyst to describe your role as consultants, because this is a word that I've used to describe extension departments. I think the extension department acts as a catalyst, bringing together the resources of the university and the community as a whole. And it's quite clear to me, that one of the crucial things that has to happen, at least as far as the relationship between the extension department and the rest of the University and the teaching staff is concerned, is that the extension department has to be accepted as an academically respectable unit within the university. So my approach has been, to direct a fair bit of attention and effort towards gaining and retaining academic respectability.

I don't think that any extension department is going to ever be in the position of being a little university within a university, and have experts in all areas who can go out and teach. Some people, I think, tend to think this way. I would prefer to look on the rest of the university as working for me. We've got a very small university but we've got four hundred staff members, and they're all potentially people who work for the extension department. But they will only work for the extension department if they think what the extension department is doing is academically respectable. They will work, to some extent, in areas where they're not too sure about the academic respectability. Everybody will work for a buck from time to time. But it's my observation that you must demonstrate to the teaching department that you have something that can benefit them in an academic way, either provide them with an outlet for attempting experimental programmes, or an outlet to do a little missionary work, because I think there is a fair bit of a missionary spirit in every academic. He wants to go out and save people in the community, and I think this is good. But I think how you go about doing this in each institution will vary. I have tried to do it by involving my programmers or administrative officers, as we call them, as closely as possible with the department activities, the one most closely related to the area of expertise of the individual. And I've been careful to try to relate individuals to a number of departments which are more closely related to that person's area of expertise. So that when a man goes and talks to an academic department about a programme that he has either thought up, or a programme need that he has discovered as a result of his contact with the community, he can talk about it in some kind of knowledgable way, and he is familiar with the language that is used in dealing with that subject area. I think ideally one should have one's administrative officers teaching, and perhaps doing research within academic departments in order to gain this kind of acceptance.

I think the one place where people in management, in a business sense, miss the boat, is in not understanding the kind of mystique that is associated with what I could call colleagueship within a university. You don't get people talking at an academic level about superiors and subordinates. It's true that in certain kinds of relationships, in budgetary matters, there is clearly this kind of superior-subordinate relationship. But most of the activities that go on go on in a kind of spirit of equality, in the spirit of colleagueship. He may be the dean of the faculty but he's my colleague.

Bill Benn: Formal lines are subdued?

Fred Terentiuk: I was really interested to hear the comments you made about George's operation and how loose it seemed to be because that demonstrated to me quite clearly that you didn't fully understand the kind of feeling of colleagueship that existed in the university. And I can't begin to define it. It's very hard to put your finger on. Now, my feeling is that the only way that you can develop really effective liaison and coordination of university departments is to develop a strong sense of colleagueship between your staff and the rest of the university.

Gordon Selman: Our pattern, I think, varies, but falls roughly into two categories. In the case of our programme people who are operating in professional areas, we try to appoint staff with qualifications in those areas, and after consultation with the deans of those areas. And we tend to have continuing education committees or councils for each of these faculties, which are made up largely of members of the faculty and usually representative of the professional group downtown. And our man operates in his programme on the basis of policy and advice laid down by this kind of advisory committee. And this provides at least some of the liaison.

Of course, there's day to day liaison with individual department heads and experts in different areas. When we move out of the professional areas into the general camps of arts and science, in one or two cases we have kind of overall window dressing committees, which we were forced into to some extent. Nevertheless, the real liaison tends to go on through ad hoc groupings of one kind or another, based on particular courses. Although the pattern seems to differ from one to the other, I guess perhaps the crucial difference is that in one area, generally speaking, we know who the potential students are. They are an identifiable professional group. In the other case we do not. I think this is about how we approach liaison with departments. The only other thing I'd say is that in the arts and science area, where there is a lot of ad hocery going on, we also try to use the department head as a point of contact, and make sure that he knows all these various other things that are happening.

Bill Benn: Gary, have you any points that you wish to make?

Gary Beatty: I think I agree essentially with Fred. In Regina, we're very new, but developing very quickly.

But we think the question of liaison is terribly important. So important that we want to staff our programme area with joint appointments. And that means then that we pretty well have to have a sort of a primary departmentation that reflects the university organization. I've listened to others speaking around the table and it appears there are, you know, going to be increasing problems of interdisciplinary coordination where this kind of programming is involved. There are problems with the level of the job, the professional group and geographic considerations and so on. So it seems that we have to sort of mix the process. And I was just wondering what, in your experience with other forms of organization, in industry etc. are dangers in mixing the pattern?

Bill Benn : Well, I think there are obviously a number of criteria that are involved, size of extension operations, homogeneity of content of programmes, your personnel skills that are available at any one time. There are obviously factors in each situation that are peculiar to that situation.

Gary Beatty: But you must have run into the same kinds of problems that we're talking about here, points 2 and 3 in other areas.

Paul White: Well, I wonder, I was just going to ask a question related to the business enterprise, if you like, as it fits into the university scheme. Talking at the colleague level, the importance of the colleague relationship and the mutual respect between extension department and the faculties involved. Given that, as an environment though, what can or should the university administration do, if anything, in order to promote a better relationship? Can they do anything to promote a better relationship.

Harold Baker: May I comment on that from the standpoint of clarifying the question, at least for me? In the organizational patterns that we have across the country, we've got those universities which have chosen to decentralize their staff, so they have extension people largely being located around the campus, and as small as possible central staff. So it's largely integrated. Then there's the other group that Fred's alluded to, where they have developed, in a sense, a small extension college and, you know, instead of using the college of commerce perse, they have appointed a commerce graduate on their staff to go in and teach. So there's those two. And in the middle there's what Gary started out, if I may reveal this Gary, started out as a joint appointee between the School of Administration and the extension. And we're experimenting with that also. We've got about five such people. And we're still experimenting as we aren't sold on it, necessarily. We see its drawbacks and so on, and we're wondering whether the traditional administrative realities are a myth.

You know, the two bosses contest, splitting salaries down the middle so that each has a certain amount of control, etc., at stake, as it were. And whether or not this colleagueship can be developed to the point where all those old ideas of you can't have two bosses, etc., can go out the window, and goodwill will make this an ideal relationship, where a foot in each place extends this colleagueship idea to the maximum. I don't think I'm conflicting with Gary's question, rather I'm trying to clarify it. What *really* is your experience in this business of how do you get this integration where you have mutual interest, hopefully, or try to build them.

Stuart Tweedie: There is a new factor emerging: among your colleagues there's a growing group of specialists in university administration, getting bigger and hopefully more instinctive from an academic point of view. But how do you extend this colleagueship? In other words, if I were teaching History and I was asked to recognize a colleague in extension, I think the first thing I would say to him would be "What do you profess", and "When do you teach it". Now, that's a hard, hard question.

Fred Terentiuk: That's why I think that a man can profess in a discipline, an area in which he has training in depth. And that doesn't preclude his effectiveness or obviate his effectiveness, as an administrator. I teach as a physicist. I teach because I enjoy teaching and I hope I will continue to teach for many, many years to come. The kind of physics I teach, of course, will change. I certainly don't have the time to continue on with my particular area of research. But the point is I can still teach an area of physics that I can develop myself.

Jindra Kulich: This bothers me profoundly, because what you guys are saying is that, and the teachers are in the same boat, they say that if that teacher is a good teacher they can make him a principal who is an administrator, and he'll be a good administrator.

But you try to suggest to teachers that they hire a trained administrator into a school, oh, God no, he has to be a teacher first. So they are taking away on one hand and not giving on the other.

Fred Terentiuk: No, but I didn't say this. I just simply said that a man could teach and still be a reasonably good administrator. I didn't say that this was a necessary condition. I just said it would be possible.

Jindra Kulich: Yes, yes. But still, I could not pretend that I can ever be a good psychologist. I don't have the training for it. But yet a psychologist appointed to extension, all of a sudden knows enough about administration. How come?

Gordon Selman: Well, this, it seems to me raises a question even bigger than that. It certainly does raise the question as to what the people in extension are there to do. And our different organizational patterns that we're talking about create different kinds of opportunities. Some people tend to talk about extension people as administrators. And that's really the general role they see for it, administrators and organizers. Some people tend to see the extension person as an educator, whose chief competence is in the area of educational planning, of designing learning experiences, with a kind of general application, rather than the physicist doing this, or the psychologist doing this. And the question we've now opened up really does put the cat with the pigeon as far as we're concerned around the table.

Stuart Tweedie: How do the academics admit to colleagueship with a first-class extension administrator and thereby satisfy Fred? Well, if you have a first-class administrator of university extension activities, it's desirable that he be regarded as a colleague by the rest of the campus.

Fred has really put the cat with the pigeon.

Gordon Selman: But it's on the basis of what competence. One way of doing it is...

Stuart Tweedie: But administration is recognized as being irrelevant to academic competence.

Bill Benn: It's a separate field.

Gordon Selman: And not just that. This area, not just administration, but of programme planning, of educational planning, to what extent is this a legitimate and a recognizable area to which one can gain his sense of colleagueship with others.

Stuart Tweedie: If the others will reciprocate by extending it, we may make every effort to qualify. But what are the factors that influence the attitude of those whose ranks we would join.

Gordon Selman: Well, we sometimes create problems for ourselves by creating somekind of a mystique about this business of programme planning whereas we really don't know a damn thing about it. This is a problem too.

Stuart Tweedie: Unless we have extension.

Harold Baker: Aren't we talking really about a blend here. And what concerns me, it does Jindra, if I'm interpreting correctly, is that I'm not suggesting for one moment that a physicist, (and I'm not talking about you, Fred, because I don't know you that well) a physicist may well be a good administrator. He may well be a good educational planner.

But if he is, it surely is by some kind of innate happen chance, because sooner or later we have to come to recognize that at the same time that he may have a PhD in physics, there are other people taking PhD's in educational planning and PhD's in administration. So there must be a fair amount to learn. And I suppose that's why some of us are here, to pick up a bit of knowledge. But the point is, I think as a group of people concerned we have to continuously discuss and get across the idea that our job is a blend, and that we shouldn't really push aside the fact that there's nothing to learn in these areas. And we can't understand why people are going around worrying about it. I'm not suggesting you're worrying Fred.

Fred Terentiuk: No, I didn't for a moment suggest that there aren't principles that one has to be familiar with in doing this thing called administration. All I'm trying to suggest is that if we talk about wanting to provide opportunities for people to continue their education and develop in the community, what makes us suddenly think that we ought not to do this ourselves? That we ought not to continue to develop ourselves? And I really wonder whether or not developing yourself as someone more and more expert in the techniques of administration, for the sole purpose of using those techniques, and not perhaps for the purpose of teaching other people about them, is a meaningful kind of thing. I mean if all you're doing is learning theory x and theory y and management by objectives, if all you're learning is those techniques and how to apply them, I don't think this is sufficient. I don't think that's a kind of professional development. It's a kind of a personal development.

Paul White:Fred, if I could draw an industrial analogy to your situation. As I understand your situation, you're in charge of an extension department in an administrative capacity and also teaching. It seems to me the industrial analogy is one of the design groups, an engineering design group, which is broken into five units, preliminary design, development, testing, and other functions.

At some point in time one of those particular men has to move up into the role of being in charge of the four or five units, four or five sub-units. And it strikes me that if he moves up into that position which is basically an administrative or managerial role and carries on the same kind of things, in a sense, that you're carrying on, the teaching, that he would be looking after the unit that he has drawn from as well as providing, to the best of his ability, the overall management.

Fred Terentiuk: He can't try to do all of both jobs.

Paul White: Well, in the industrial analogy this could be a very serious mistake from several standpoints, let alone people development in the sub-unit from which he was drawn; the fact that you wouldn't get the proper management or administration of the group as a whole because there's no one-man focussing on that, even though the individual might like to do that.

Fred Terentiuk: Let me give you an analogy, a business situation with which I'm familiar. A large American company I believe it was General Electric, decided to go into the computer business in a great way. And they made the assumption that they could take a successful manager, at a very high lever and place him over this new business. This man had been very successful in the area of making x-ray tubes, and before that, light bulbs. And the theory of management was, because this man was a really successful administrator he was ready to head up their computer business. And General Electric lost, I've forgotten how much, something around $300 million trying to make computers. They didn't make a computer. They had moved into a kind of area where it wasn't enough for the man to know how to manage, but he had to know something about what it was he was managing.

And what I'm trying to suggest is that I think in the extension department there is an element of this, that has always existed and will always continue to exist. If you're going to manage programmes in extension then you must, I think, ideally have some kind of feeling for what happens in the academic side of this institution called a university. And I think, ideally you ought to retain a kind of feeling for how that side of the university may be changing as the years go by. And to me it means retaining some kind of contact with the teaching or the academic side of the university.

Bill Benn: But this doesn't exclude effectiveness on the other side.

Fred Terentiuk: No, no.

Bill Benn: We're running kind of late. These next two or three questions I hesitate to ask. But obviously four and five have an affinity. They're not unrelated. Perhaps five should reasonably come before four. Fred, maybe you'd respond to this question. Is it possible to localize authority and accountability in each senior position, including that of the director, in view of the high level of liaison and coordination required with many university departments. In other words, does this union of colleagues, this esprit de corps that you discussed, does this, in your view, make indefensible the proposition that you can in fact structure and manage an extension operation as you would a profit and loss business.

Fred Terentiuk: No, I don't think you can, not completely, simply because you can not force a department to provide you with instructors for a particular programme that you might think is great. So to that extent you have no control, and there's no sense in talking about giving your extension programmer the authority to go ahead. All he can do is to be reasonably knowledgeable about the problems that are developing in a particular field related to the Department and to be in a position to talk to these people about programmes that might be necessary, to be desirable - These are 2 different things.

And once a programme is decided upon, and agreed to, as a useful university level programme by a Department, then I think you can begin to define the authority and responsibility and accountability of the programmer. He is clearly then responsible for expediting the programme, and he is accountable for the details that relate to the success of the programme. This is not to say that he has to run around and push every piece of paper. He clearly has a backup staff that is accountable to him. And there you can define much more clearly the roles. But because he's in this kind of catalyst position, you know, he's no different from _you_ people. Your firm can't hold you accountable for whether or not this group will accept or reject you. I mean, once there's been some kind of agreement, then you people can go ahead and carry out your activities. But to that extent, you know, that area you can define as your responsibility.

Bill Benn: All right, let's go on to the related point then, which is question four. Is there a case to be made for making extension activities more independent of the university environment than they are now.

Fred Terentiuk: Independent?

Bill Benn: Faculty status sense.

Fred Terentiuk: But that would make it a greater part of, or in other words, push it the other way.

Bill Benn: Which way?

Fred Terentiuk: Give it the kind of academic status it ought to have.

George Boyes: But that's what Stuart has just done, to give his department a division status.

Bill Benn: What has this done, in fact, other than the name change?

George Boyes: Well, it did plenty for ours.

Stuart Tweedie: It's done a lot for me. The senate doesn't quite realize it.

George Boyes: But when the president writes to heads of faculties, colleges, institutes and centres, as well as divisions, he puts 'to the heads of all divisions', which to me indicates that he means that he thinks that all of us have some equal status at some point. Faculty wouldn't be a word I think we should use.

If you want to say a multi-faculty college, or centre, or institute, now we have both centres and institutes on our campus that are multi-faculty as it were. All the disciplines contribute to Criminology or Town Planning or whatever it is, architects, engineers and sociologists, etc. And so I think if we substitute for faculty quite a few other words it would be possible. But I don't think faculty is the word.

Gordon Selman: Well, let's see now, in the case of Atkinson College we have, they call it a college, but it's -- in our language at any rate, you could substitute faculty.

Bill Benn: At York?

Gordon Selman: At York. This is the case, I guess, of a unit that is more independent, in the sense that it has more control over the deployment of staff resources. Now, you gain some and you inherit some problems when you try to do this. But it is an alternative, presumably. And one that some institutions in Canada and the United States have chosen.

Bill Benn: What are the problems, Gordon, typically, that you inherit when you go this route?

Gordon Selman: Well, one of the problems, one of the worries at any rate, is that of creating a second group of competent people in the various subject matter areas, and the possibility for odious comparison between the level of competence of one group as against the other group. And in North America we've seen the experience of a number of institutions where the evening college or the extension college, so to speak, come to be looked upon as second-rate aspect of the university. This is one of the problems.

Bill: Do you think there's more danger of this happening under this other alternative, such as Atkinson, than there is under the arrangement which presumably exists here in most cases?

Stuart Tweedie: Would that not destroy, on the basis of one of Fred's arguements, the essential nature of being a colleague?

Fred Terentiuk: What do you mean?

Stuart Tweedie: If you have two separate little universities, to take the glaring case, Wisconsin. If I teach for the extension division in English, how am I related to the guy who teaches English in the faculty. And another problem arises, it's easy to see there are two standards because the standard of content changes often without you noticing it. Who is responsible for the teaching of English for the two functions at the University of Wisconsin?

It's clearly the head of the department of English in the intramural situation.

Gordon Selman: Well, don't misunderstand me. I don't think that it's inevitable that Atkinson is going to be of a different or lower standard. It may be a higher standard than the same activity in the other subject matter departments in the rest of the university. But if you use the pattern that we tend to use as a group, then the man that you've got teaching your English course is someone you've drawn out of the English department to teach it. And you may have problems of overload or something. George has a number of cross-appointments, whereby the man teaches your course as part of the load. There you have one kind of relationship. In the Atkinson pattern you'll have a man in Atkinson who teaches English. And there are two problems. One is, is there in fact any difference between the level of competence or what have you. The other is, what do people think about whether there is a difference.

Stuart Tweedie: And who has the ultimate responsibility for your effectiveness in teaching English?

Gordon Selman: Right. That's right.

Gerard Lafreniere: In other words, the question seems to boil down to, is it desirable for the Extension to hire its own staff, or to be there as a coordinating body to make use of the staff of the various departments, thus leaving the decision of hiring staff and controlling course content to the department chairman of the various departments throughout the university. I personally think that it is desirable for the quality of the courses and the degree both within the university and in public opinion, for the extension to be more of an administrative area, making use of the regular staff of the university.

And even the part-time staff, that teaches at the Extension should be screened and hired by the department chairman, and thus responsible academically to the chairman of departments. For example, if you have a professor teaching English at night, he could be answerable to the chairman of the department of English.

Bill Benn: For the professional quality of the course?

Gordon Selman: Well, I think that's the choice you make. I don't think there's a wrong or a right answer between those two. I think you make a choice and then there are problems and advantages in doing it either way. I don't see one being right and the other wrong.

Bill Benn: It's not meaningful to speak of them as being right or wrong.

Gordon Selman: I don't think so.

Fred Terentiuk: I think it's possible to think of faculty status for Extension much the same way as we think of faculty for graduate studies. Here's a faculty which has no teaching staff of its own, it clearly draws from other faculties for teaching. I see one real advantage to a faculty status for Extension, and this is it does give to the part-time student, a part of the university, a respectable part of the university with which to associate themselves.

Bill Benn: Which is difficult to achieve otherwise?

Fred Terentiuk: As it is now, for example, at Calgary, the part-time students are registered in all the other faculties. And yet the programme is administered by Continuing Education.

These people, essentially, come on to the campus for their course and I think that in many ways this is really very bad for the university because these are the people who could help the university in many ways. What is needed is a unit with which they could identify themselves, a unit out of which they could transfer if they wanted, for degree purposes, to a faculty more concerned, like the Faculty of Education. But they would essentially be definable, if you like, by an academic unit. You may think this is just a gimick, but I think in many ways it would do away with a lot of the first-rate, second-rate concepts of the problem.

Jindra Kulich: Well, will it not do exactly the opposite? I know of a system in Canada where credit for the part-time student, including summer session, are not transferrable on your normal degree. There are two kinds of degrees. Now, this makes no sense to me.

George Boyes: They had this problem at Atkinson. When Atkinson first started their students were saying to us "Why can't we have credit for our First Year English. And we said as soon as York starts its first year, we'll know what to do. And it took them a couple of years before the IntraMural Faculty at York would give credit for an Atkinson course in English. They do now. But you're quite right, Jindra.

Fred Terentiuk: No one considers a person enrolled in the Faculty of Graduate Studies as a second-rate student. Because those students take courses offered by the faculty department, engineers, etc. I mean, these are courses that have got the stamp of approval of the faculty's assistant administrator, structured, established in order to expedite the handling of these students and I think to give these students a kind of mental identity.

Bill Benn: Is it essentially the same as an Extension operation in that sense?

Fred Terentiuk: It's not in the one area, although here I may be on thin ice. It is not the same in the areas of credit since they're not involved. On the other hand, there is a semblance of extension characteristics about some graduate schools, which have associated with a research institute, because there is a kind of transfer, liaison, coordination, cooperation between university credit work and research work and courses and seminars which are going on in these separate centres that are somehow not a necessary part of a graduate school.

George Boyes: Is this like O.I.S.E. in Toronto, you know, the student can transfer to or from the university.

Harold Baker: We may have made a proposal on this--it's never been accepted--but the premis that we made, if Fred's idea would work, is that, like the college of graduate studies, we proposed that not only the senior members of the Extension division be on this faculty, but that would give him appropriate representatives of all colleges and departments be named to sets of faculties. It might be joint-appointees, it might be the liaison people or chairman of your planning committee, Gordon, whatever. But in any case, it would have to be a faculty which the whole university could say it had a stake in and had legitimate representatives named to. I don't think it should be a faculty at the edge of the campus called extension of some kind.

Jindra Kulich: But shouldn't you look at it from the point of view of the student as well. Not only the organization and on our part, but how would the student feel. I know that as a student, whether I am part-time or full-time is an utterly ridiculous and artificial distinction. I am enrolled in the faculty of Arts and Science and a student of the Faculty of Arts and Science. Whether I take one course, two courses, twenty courses, shouldn't matter.

Why should I be another animal because I take one course at a time. This irritates me. I don't see the distinction.

Mary Cutler: Also involved here is the integrity of the degree too, is it not? I mean, as a categorization of part-time and full-time; the degree of the student who is not a part-time student, you know, he's full-time, in this one course.

Jindra Kulich: Well, this is the mystique that our universities have. But the full-time student by osmosis gets something more than a part-time student. This is a lot of nonsense as far as I'm concerned.

Mary Cutler: But part of it can be controlled administratively, in terms of the delegation of responsibility for the integrity of the degree of the student who does not come under full-time. This can be cross-departmental. I mean, it is my responsibility delegated from the Senate for the integrity of the students who are mature and who come, not taking full-load courses. But when it's done this way then it cuts right across the departments and the faculties and it requires an involvement within the university itself from all levels.

George Boyes: I think that we're concentrating on structure so much that we're leaving out some other possibilities. And this is meetings with your instructional staff in Extension where they discuss their problems in the teaching of English at night. And in some of our departments where we have twenty or thirty people teaching in Extension, there's also a liaison man, a liaison of Extension, who works quite closely with the assistant director in charge of the courses, and his chairman and that will figure when we need to enter.

Another thing that the students did on their own, we arranged for our students to be able to eat in one of the places on campus. And they were eating there in groups and talking in groups and they decided to ask professors to have dinner with them. And there's been quite a response on the part of the professors. And this was happening before we knew it, and has been going on for months now. And this "just happened." And there's one more thing I'd like to say, college versus non-college, or whatever it is we're talking about. We have a very complicated system in the University of Toronto, in its history, because it involved four universities within the University of Toronto, all of whom still hold the degree-granting powers, but hold them in abeyance to a University of Toronto degree. We also have the affiliated colleges which have a discipline they don't want to give up. For instance, Trinity of St. Michael's gave up medicine and law. And we have some affiliated theological colleges that don't want to do anything but theology and that's not a university discipline as far as we're concerned. So they are affiliated. And then we have the integral colleges like the university in the new Scarborough, Erindale, which are part of the university. But, they are an integral part of it. One of the things that has been proposed in the present investigation that we're doing of arts and science is that the old federated colleges give up their teaching departments because of a funny sort of combination of courses. For instance, if you belonged to Trinity College, you take English, French, German, Spanish, Ethics, things like that, in your college. And then you go to take your Social Sciences, maths and History, except Greek and Roman, in a university department. And why is there all this complication and why are colleges in a position of having to persuade a man to come to work for them rather than the university proper. Now why not give up all of this and make your college the place where you go for Health and for identification, you know, as far as living is concerned, and counselling and that kind of thing.

Now, this has not been decided but it's been pretty hard to win the debate one way or the other. What does a college exist for? And this has been immensely interesting to those of us in extension who are talking about what kind of separation we might have from the rest of the centre of the university as it were. What they're saying is how they're defending it and we spent nights and nights at hearings on the matter. And it's pretty hard to defend one way or the other what the advantages or disadvantages are. But I'd rather like to see it being debated in a whole integral complex. They're not talking about part-time students or extension students or anything. They're talking about this set of day students as compared to that set of day students.

Bill Benn: Thanks George. It's well past lunch time, so I won't say any more. I hope this has been as useful to you people as it has been interesting for us. So, thank you very much.

# THE UNIVERSITY and ECONOMIC MACROCHANGES in the CANADIAN ECONOMY

Professor John J. Deutsch
President-elect, Queen's University
Former Chairman, Canadian Economic Council

I take it that my task this afternoon is to provide you with an economic framework against which we can look at the field of adult education. I'm going to try to present very briefly some of the main factors that are present today and will be present in Canadian economy for the next ten or twelve years which are likely to dominate developments in Canada and the way the economy will grow in the years ahead, and put emphasis particularly on those aspects which are of interest to educators.

Three things are important in this regard. One, the significant features in the structure of our population. Secondly, the requirement for a rapid economic growth. And thirdly, the implications of the growing complexity of our economic society. These are the three things I want to talk about.

The population structure and its changes are undoubtedly the most important elements in any economic society. There's nothing more important than what is happening to the population. The significant feature about our population structure is that it contains some quite unusual features in this period that we're now in. And these features will continue to operate for the next ten or twelve years. Now, these peculiarities have a very strong effect on our economy.

To give you just the bare bones of this structure: first of all the population as a whole will grow by about twenty-five percent between 1965 and 1980. Now, that's not a particularly unusual rate of growth, but it's larger, relatively, than that of other highly developed countries. This is one important fact. It will be significantly larger than the rate of growth in the United States. However, this is not particularly noteworthy, except the fact that the rate of growth will be somewhat larger than that of other industrial countries. The significant fact is to be found in the distribution of the age structure of that population and the working force group in the population.

## THE WORKING FORCE

Let's take a look at working force. The working force will grow by about fifty percent. While the population grows by twenty-five percent the working force grows by fifty percent. This is a fact of basic importance: this rate of growth is extraordinarily rapid by any measurement whatsoever. Whether by historical comparison or if you use comparisons with other countries, this rate of growth is extraordinarily rapid. It's about fifty percent faster than that of the United States. This is the sort of position we're in. To give you some idea of the peculiar nature of this, as compared with other advanced industrial countries, this rate of growth is many times faster than anything that's taken place in western Europe. I'll give you another. Our labour force in absolute numbers will grow as much as the labour force of Germany and England combined. And their population is about six times our population. So in absolute numbers we will add as many people to our working force as Germany and Britain together will add to their working force. Well, this is a major factor of fundamental importance. I'll come back to that later on.

Now, I already referred to the age group distribution which is also very peculiar. One reason indeed for this rapid growth in the working force is that it reflects the big increase in the young age groups in the population who will be entering the working force during this period. They are the hump of the population that's moving through resulting from the high birth rates in the 1940's and early '50's. This group of people reach the working ages in the period 1965 to 1980. Many years back they were in the primary schools; they're just now filling up the secondary schools and coming out into the universities in the last year or two. And there will be coming an increasing flood into the working force in this period. However, I might mention in this regard, that while the population as a whole grows by twenty-five percent; the work force by fifty percent, the age group eighteen to twenty-four, during this period, increases by two-thirds, roughly speaking. So the high birth rates of the '40's and early '50's is one of the big factors that explains the fifty percent increase in the working force.

The second element that explains the increase is the large number of women in the work force. In Canada the number of women from the working force has been small compared to other industrial countries. Typically, in the advanced industrial countries about one-third of the working force is made up of women. Typically, in Canada, of course, is much less, more like one-quarter. But developments in recent years are showing that we are now in the process of catching up to what is the more typical situation. We expect that by the end of the period, 1980, we will have about one-third of our work force made up of women, which is already the case in most of the advanced industrial countries. Now, this 'catch up' or this rapid movement of women into the working force contributes to the rapid growth in the total working force because we're bringing them in fresh, you see. And this seems to be going on at a rapid rate right now, and it's likely to continue for some years.

Then, there's a third element that contributes to the rapid growth in the work force. And that is immigration. We receive, in Canada, a relatively large number of immigrants compared to most other countries, permanent immigrants. Compared to the United States for instance, the proportion coming to Canada as immigrants is fairly large. We expect in this period ahead that immigration will run somewhere between 150 and 200 thousand a year. This is a figure we've been at for the last several years, and it looks like this is a kind of figure that we could sustain, given reasonable economic conditions. Now, this is relatively large in comparison to our population. They will provide about sixteen to eighteen percent of the growth in the labour force every year.

These are the main factors giving rise to the rapid growth in the labour force. And all of them of course, have implications, from the standpoint of education and so on. But these working force movements, however, are not the only ones significant in the population. There are two other things that I should draw attention to. And that is the situation in two important age groups.

## 5 - 14 AGE GROUP

The one is the age group five to fourteen, which is at the lower end of the scale, the ones that come into the primary schools and start moving into the high schools. This group is going to remain relatively constant throughout this whole period, in absolute numbers. Actually, the group will decline in absolute numbers after 1970, slightly. Now, this affects the nature of the population very much. And it affects the school system particularly, and the economic situation as well because it affects housing; it affects many things, the fact that the number of young children, as a percentage, are going to decline. Their absolute numbers are not going to change very much over this whole period. The reason for that is the birth rate, as far as we can see at the present time.

The birth rate has gone through extraordinary fluctuations. In the 1930's the crude birth rate was about twenty per thousand. It jumped in the '40's and early '50's to twenty-eight or twenty-nine. That's by forty percent or more. And now, in 1966, it has dropped back to the lowest figures reached in the 1930's. And there are strong signs to indicate that for some years to come now this rate may even decline further. In the projections we've been making in the Economic Council we have assumed, from what I've done and the figures I've given you, that the decline will not go any further. It will stay at the present low rate. But some feel it may even fall further.

Now, this drop in the birth rate will result in no increase in the numbers of these very young people, over this period. In fact, the numbers would drop were it not for the fact that the number of marriages are going to go up in the next few years. This great number of eighteen to twenty-four group, which are going into the working force, are going to get married, most of them. And so our marriages also are going to increase by fifty percent. The number of households in the country will grow by fifty percent in this period, between now and 1980. The large number of marriages will maintain the child population at about it's present absolute level. But that means that every couple will have fewer children. It's only the numbers of marriages that will maintain the number. There clearly are important sociological forces at work here, as well as technological ones, I assume. How long they will persist, we can't say. But there's no indication at the moment of any change soon.

## 30 - 45 AGE GROUP

There's another age group to which we must look that affects many things, economics, education and everything else: the age group early thirties to forty-five. This is a very important group out of which the directing element of our society comes. Middle management developing into senior management; when they start taking management responsibilities, directing responsibilities. This group is going to be very small, reflecting the low birth rate of the 1930's. This is the group that was born in the '30's, the group thirty-five to forty-five, thirty to forty or thirty to forty-five. It's going to be extraordinarily small in relation to the total population, its numbers will not grow much over this period.

So we're confronted then, in our society, with a shortage in the age groups where we look for superintendents, officials, managers, directors, things of this kind. When the more senior responsibilities begin to be assumed in this group, we will be terribly short. Everybody knows that now who's doing any recruiting at all, that this is a dreadfully short age group even now. We find it reflected in all aspects of life. Whether it's looking for university professors or looking for managers, you find you have the same problem. The numbers are very few.

This means that we've got to do one of two things in future. We've got to use more quickly our young people for senior responsibilities. We've got to develop them faster; that means more training as they go to work or rapid development of their capacities. And we have to continue to use the older people for longer times. And that has implications in regard to keeping up to date the older people who must continue to assume responsibilities. So here are some of the main features of the structure of the population that you should keep in mind.

## NEED FOR RAPID ECONOMIC GROWTH

If we are going to provide employment for this rapidly growing number of workers in our population the economy has to grow rapidly, more rapidly than has been the case historically, and more rapidly than most other countries. Because only through expansion of the economy we will get enough jobs for these large numbers of young people and women coming into the work force. We have to look then to where we might get this economic growth.

We can eliminate some things immediately. The primary industries, which consist of agriculture, mining, forestry, fishing, these great primary industries, which are so important in this country, will not be employing more workers over the next fifteen years. If anything, they may even reduce their employment. Certainly, agriculture will reduce the number of people that it employs, over this period. And I suspect that other of these primary industries will too.

So that the increased employment must be found in secondary industries and in the services. Now, the fastest growing industries in the secondary industries are what we call the so-called science based industries. These are the fastest growing, the technologically based industries, chemical, electronic, machinery, transport apparatus industries. There is where we get the fastest growth, also the production of synthetic materials and so on. The things we notice here is that these are the industries where you require the highest levels of skills, in the form of engineers, technologists and scientists. Most of the growth in the secondary industry will take place in these industries. It will not take place in the more traditional old-line industries such as making boots and shoes, clothing, and things like this. As we say in economics, the elastic demand is for the products of these other industries. And so here is where the growth is going to be mostly, and that's where the demand for the skills is the highest.

Now, the other area where we have to look for most of the employment is in service industries. Indeed, most of the increase in employment will be in the service industries. This has been the case, you know, since the end of the war. In Canada, four out of five of all new jobs, since the end of the war, have been in the service industries, and that's going to continue to be the case.

Now, what service industries? Well, one of the biggest employers will be the whole field of education and information. This is already the biggest single activity in our society. It's the biggest item of government expenditure. It is far the fastest growing, that and health care. And it's going to continue to be the single biggest activity in society, education and all the associated activities, information and so forth. And that's going to be the place where large additional employment is going to take place.

Next, government services of all kinds will continue to grow rapidly. Leisure pursuits, culture, recreation, all these areas are going to be large employers of labour; research and development which is closely associated with education; and finally, health care. These are the areas where great employment is going to take place. Here again, you'll notice that all these have a high content of professional education. Education and information, research, development, government services, culture, medical care, all these things involve both professional and specialized kinds of skills and education to a high degree. These are the places where we're going to see growth, and where the jobs will be.

Now, the opportunities for the unskilled with very little education are going to be very poor. The developments are not such as to provide rising opportunities for people without any qualifications. Unfortunately, the society just seems to have no place for them, or a very small place for them. Now, that may be right or it may be wrong; it may be unfortunate, or whatever you want to call it; it may even be sociologically undesirable, I don't know. I know there's a good deal of concern over this problem, that many people claim that there are a lot of people who simply will not have the aptitudes required and the system has no use for them, so the system is to be condemned. Well, that may be so. I don't know, but that's the way it is. And there's no use fooling ourselves about this, that's just the way it is. And all you need to do is look around now and all you see is evidence. You look at the Negro unemployed in the United States; you look at the areas in our own country where the levels of skilled education are low and you will see the areas of the worst poverty in the land. And you see little hope as well. So this is it. I'll say again, now, this is just simply one of the basic factors in the nature of our development, whether it's rightly or wrongly or what we can do about it. Now, so much for the question of growth.

## URBANIZATION

Thirdly, I want to speak about the growing complexity of our economic society and its implications. One of the consequences of these trends that I've talked about is that we will continue to urbanize our society at a rapid rate. These activities are likely to take place in urban conglomerates, not on the fringes, not on the outside, not in the fields of the land, but in the great cities of the land. That's where these things take place, that we're talking about. The urban population will become an increasingly larger part of the total population. The farms and small towns will continue to lose population. At the present time about seven percent of our working force is in agriculture. This is going to drop further to something like five percent, maybe four percent. They can produce all the food we need and have a good deal for export, more than we can sell as a matter of fact. So these people will move off into the larger towns and cities. By 1980 we expect that eighty percent of the population will be living in cities over 100,000. One of every three Canadians will be living in three cities, Montreal, Toronto or Vancouver. More than three-quarters of the population will live on less than one percent of the land area of the country. In this huge land, this enormous territory, the people will all be living in a very tiny fraction of it.

This urbanization will greatly increase the complexity of our society and raise many problems. For instance, man's relation to his environment is going to be a critical problem: all of us huddled together in this tiny space and how we relate ourselves to our environment, our water, our air, our space, is going to raise many social problems, technical problems, on how to preserve our environment. These problems we know too little about today. But they will require much research, much new skill, much new effort for which people have to be available.

Also, the growing urbanization will mean that the government services part of our activities will increase greatly because the more we bunch together, the more we have to do things collectively. So our government services will grow in these areas, particularly at the local levels (not at the national levels). What comes out of all this is the shift in emphasis from great vast national concerns to the local levels, where the action really is to a large extent in these crowded cities, where the problems are. And we have to be able to deal with them, and as I say, we require much talent, much new information and much skill, whether of administrative character or the scientific and technological character.

Then, there's the other complexity that arises from the explosion of knowledge, which is proceeding at an expedential rate. We are devoting vast resources today, compared to any historical period, to the extension of knowledge, in the form of research, development, much greater than anything we've ever done historically. The result is we're getting an accelerating growth of knowledge, making the whole society extremely complex, giving rise to need for increasing specialization in order to master this exploding knowledge. And the relationship of these specialties to one another creates enormous problems.

On the one hand, we have increasing need for the generalist who's capable of relating these things to one another, and we need that very badly. On the other hand, to grasp knowledge it's necessary to go down a little more narrow channel. Now, we have a basic dilemna and a basic conflict which we have to resolve, because only if we can relate these things to each other successfully do we make our existence tolerable and successful. So this growing complexity of our society poses enormous problems for the kind of education we need, the kind of administrative systems we need, and so on. And how successfully we solve these will have a big impact on the economy itself, and how well the economy performs.

Now, I think it not necessary to "dot the i's and cross the t's" about the implications of some of these macro-economic developments for education in the universities. You can see that most of these trends in development converge on the universities as a matter of fact. The university, therefore, is subject, at the present time, to forces of change, which I think are far greater than any other social institution because these things converge on it from almost every direction, the numbers of students which is explosive for the reasons I've given, the age group. You see, in the last six years we've doubled the university registration in Canada. It's going to double again in the next six or seven years. That in itself is a tremendous thing. Very few institutions have to double themselves in five or six years. Then on top of that, you've got this explosion in knowledge, the problems of increasing complexity in specialzation, the demands of an urbanizing society. All these things converge on a university and on its educational processes. And they rise out of deep-seated developments in the economy and in the nature of our population.

Gordon Selman, University of British Columbia: I would have expected that in terms of the growth of the work force that the same kind of forces, roughly, would be at work on our situation as on the American situation. So why is our work force growing that much more quickly?

Prof. Deutsch: Some of the same things are operating in the United States but not on the scale they are here. Their rise in the birth rate was not as sharp as the Canadian for some reason. I don't know why Canadians should fluctuate so much in matters of this kind, but they do. The decline has been almost violent, you know. In the late '50's it started to go down. And that's true all across Canada; and I think that's true in Quebec; it's just as sharp there as anywhere else. So that we had a big peak and then down we go. Well, this was not as severe in the United States. Then, we have, of course, a much bigger immigration than the United States. You see, our immigration is the same as if about one or two million people came to the United States every year, in their terms. And, of course, they have nothing like that kind of immigration. So immigration adds much more to our work force. Then, of course, there's this thing about the women I talked about. All these things are put together to give us this big hump, you see. This is all exaggerated as compared to the United States. Now, this gives rather special problems here.

Stuart Tweedie, University of Manitoba: What would your comments be upon the probability that the life span is likely to be very markedly increased. Before long it may be quite common to wish somebody a happy hundredth birthday. What impact will this have?

Prof. Deutsch: We don't expect much to happen in the next ten or twelve years. This is a longer term problem. Actually, you know, the death rates have continued to drop somewhat. In the '40's to '50's the death rate was about ten per thousand, the crude rate. Well, now it's about eight. So it's slightly moderated the decline in the birth rate. Now, what the new medicine will do is further in the future, I think. If the transplant business and so on becomes more general and if the progress in genetics and microbiology continues we can make maybe genetic changes in man. This has enormous implications, sociological, economic and everything else.

Roby Kidd, Ontario Institute for Studies in Education: But it hasn't influenced your prediction tables very mcuh.

Prof. Deutsch: No, I think this is something more like the next twenty years than the next ten. And what the implications are of these problems nobody has really looked at yet.

Mary Cutler, Mt. Saint Vicent University: Canada has a very high infant mortality rate. I wonder if this has been taken into consideration.

Prof. Deutsch: No, it hasn't. We've assumed some slight downward trend in it, but not any major change. Of course, some of these very high rates you find among Indians and Eskimos, the poorer people.

Mary Cutler: Some certain urban areas, too.

Prof. Deutsch: How soon we'll be able to deal with this, I don't know. But we have not allowed for that. And if there's any large improvement in infant mortality then this would modify the thing a bit.

Allan Beveridge, University of Waterloo: Will you comment on the possible change in the role of universities from that breakdown you have of population changes and economic growth. With those kind of changes placed upon the university its whole role may change.

Prof. Deutsch: I think the university's role will change with the kind of world in which we will be living. The rapid explosion of knowledge which seems to continue on, and the growing complexity of our problems will mean that most of our people, the highly educated ones, particularly the professional people, engineers, doctors, teachers and others, will have to have a permanent continuing system of education. Now, the idea before at university was that you go to school at a certain time in your life and then you quit and go to work, and that was it. In the future, in the kind of world we're going to live in, most people that are in the highly skilled categories are going to have to come onto a system of continuing renewal of their knowledge. Now, it may be slow; it may be hard to adapt our institutions, but engineers will find that they have to go back every five or ten years, and spend another period at what is the equivalent of university. The same thing will be true for medical people, scientists and everything else, administrators too. And this is developing now. For instance, at Queen's University now, we have twenty-four engineers there all the time, the year round. They come back to take six months. They come for periods of one month in; one month out for the whole year. They live on the campus. They're people that have been out five or ten years. This is the Bell Telephone system. And they have twenty-four of these people on the campus all the time. We're going to see that happen in the medical profession and so on. We're preparing a scheme now for the Civil servants to come and spend a year, at least, every so often. And universities are going to have to adapt themselves to do this, more completely than they have been doing in the past.

Angela Armitt, University of Western Ontario: With this increasing immigration, a couple of questions. Are these mostly skilled people or do they need more training? And are they likely to adapt our own sociological patterns or would this influence the birth rate up again? Do they simply fit into the Canadian pattern?

Prof. Deutsch: Well, they seem to fit in pretty quickly. Now, these immigrants are coming in under the new immigration laws, based on a skill test. Generally, grade ten is what they go for now. So I think the kind of immigrants we're going to be having in the future will have a somewhat higher skill level than has been traditional. They will include many more coloured people than used to be the case because we're going to let in more coloured people if they have the required skills. We're getting more people from a wider range of countries than we have before, and less people from certain areas where we got large numbers but very often very poorly educated people. Now, mind you when they do come here they will still need a good deal of education because of language and getting a country's social customs and things of this kind. But these immigrants are not likely to affect Canadian habits very much, in the regard of birth rates and so on because birth rates are falling not only in Canada but in most of the western countries.

Angela Armitt: I guess you'd say rather that we were running into a great problem with our graduate students who come in supposedly with high language facilities, but when we get them here we find that we're not structured to help them because they're not. And yet them seem to meet the requirements we ask for.

Prof. Deutsch: This is a very great problem in foreign students. We have the same problem, so much so that we've decided we're going to have to take a much harder look at what we let in. They're not able to do our graduate work. Once you've got them here you've got to give them degrees, you know and this is a problem.

Gérard Lafrenière, University of Ottawa: You said that the opportunities for unskilled and uneducated will be very poor and probably will get poorer instead of improving. Do you see a direct relation to this specific problem with the university extension or should this be left to other media of education, junior colleges, high schools or school boards?

Prof. Deutsch: In Ontario, which I happen to know best, the new system of community colleges is being designed now to play a very large role in this continuing adult education. That's one of the functions they're supposed to fulfill, isn't it Roby?

Roby Kidd: Right, it's started.

Prof. Deutsch: But that was the objective, you see, not only to provide post secondary education in the high school but also to make it part of their job to provide facilities for continuing education in the community. And I think in Quebec the new institutes, that's one of their objectives, isn't it?

Gilles Cloutier, University of Montreal: They mostly probably have a preoccupation for adults.

Prof. Deutsch: I think it's even more emphasized in Quebec than it is in Ontario, more so than any other province, I think, in Canada; the idea of these institutes two and three years after high school, and they're comprehensive, they have several streams. And they're tuition free for everybody. And you also go from there to universities, you don't go directly to the university.

Roby Kidd: There are twelve of them; and there'll be twelve more in July; and there'll be twelve more. That means thirty-six within another year.

Prof. Deutsch: This is going to revolutionize the Quebec educational picture. And right from the beginning, adult education is one of the basic functions.

Gilles Cloutier: Even at the elementary or secondary level there's not just a trend to adult education, there's an aim, right at the moment.

Prof. Deutsch: How many will there be in Ontario?

Roby Kidd: Nineteen in Ontario and there'll be twenty-five within a decade. It might have to go more rapidly. And thirty-six in Quebec.

Prof. Deutsch: In the whole province, every major centre will have a community college which will provide anywhere from one to three years post high school education, except in Ontario mainly we'll have terminal courses, the people going directly to university. Now, in Quebec they all come through this system before they go to university. The first two years will be in these institutes. We already have some of this in the high schools. Grade thirteen has changed things very much in Ontario. They go directly to the universities, but they may also come from the community colleges, a limited number. But we're providing a whole new layer of post secondary education in these two provinces, a brand new one between the universities and the high schools. And this new layer is going to have a heavy preoccupation with adult education. In British Columbia they have a system coming along, isn't that right, Gordon?

Gordon Selman: Yes, it's community colleges with a university academic transfer programme and the other terminal programme. They're stuttering though, I mean, they're not getting going very fast.

Prof. Deutsch: Alberta has a system of community colleges.

Fred Terentiuk; University of Calgary: This is under review at the moment.

Harold Baker, University of Saskatchewan: Dr. Deutsch, I'd like you to comment on the macro picture from the standpoint of a double-barreled question. Number one, what's your speculation on the degree to which government can or might intervene in this dramatic urbanization, of which you spoke, to find a new frontier to bring a few people into Saskatchewan, say. Do you think government can, will intervene, say with industry, to dislocate the population? Secondly, and with your other hat on, do you think universities should, as public institutions, intervene to offer programmes that will get at the problems that I think you revealed pretty clearly to us about what will be needed if urbanization does in fact take place. So, my theme is public intervention, but I see the public being government on the one hand and universities on the other.

Prof. Deutsch: Well, as to the business of urbanization, I don't think that anything governments can or will do will significantly change this picture. The attraction to a glomeration is so strong that the government's attempting to change it is not likely to be very effective. Even though they provide subsidies for industries to go into the back concessions, or what have you, there's not many want to go.

Harold Baker: Many speeches one hears at a national conference these days ask, they say, how can we avoid what's happening in India and Europe and United States?

Prof. Deutsch: Well, nobody's found the answer. That's the answer. None of these things have succeeded. True, you can subsidize industry to go out into the country, but it's very expensive. And in any case, most of them fail, history has shown this. I've often tried to speculate on this. Well, the only thing one can see is that, in the first place, there are economies of scale, undoubtedly. And one of the big economies of scale has to do with manpower itself. You see, the more important human skills become the more important it is to get to the place where they are, you know, not among the Eskimos and the Indians but where they are. I wish the Eskimos were skilled, it would make it easy. But the more important skills become, the more important it is to be where the skills are. And they conglomerate in the big centres. Also, the more skilled your population is; the more educated it is, the more it wants to be where the facilities are, where the institutions are, where the schools are, where the colleges are, where everything is. And so the two things all work together, and you try and separate them. You just ask a mining company when they try and hire engineers to go up into the Northwest Territories, they'll tell you how difficult it is. They offer great wages and great comforts and everything else, but the man says, "Where are my children going to go to school?"

4/29/68

# TECHNOLOGY OF INDIVIDUALIZED INSTRUCTION

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The emphasis in both education and training has focused on how to teach. The areas of what to teach and how to evaluate what has been taught have been neglected by comparison. In the area of how to teach, the education and training efforts have emphasized lecture-discussions, audio-visual techniques, programmed instruction, computer-assisted instruction and other methods of teaching. Teachers have been trained to emphasize the presentation of materials in the classroom and very little attention is placed on whether the materials are relevant to the real needs of the learner. The classroom quizzes and tests represent the only evaluation and these things only evaluate the learner, not the materials. Relatively little emphasis has been placed on task analysis methods, objective development, population analyses and other means of determining what to teach. The third area, evaluation of education and training, has been left to the "final exam" with little or no attempt to develop valid criterion tests or real or simulated performance tests. The use of follow-up analysis to determine the effectiveness of the teaching effort has been almost completely ignored. The technology described in this paper attempts to operate equally in all the areas of what to teach, how to teach, and how to evaluate the effort.

Figure 1 compares the orientation of training for the conventional instructor-controlled class to the learner-oriented instruction of individualized training. The focus on the instructor as the key person in the classroom is removed in individualized instruction, and the attention of the environment is shifted to the learner. The main form of communication is not instructor to learner, but learner to instructor. Formerly, the learner had to observe, analyze and integrate the responses of the instructor. In individualized instruction, the learner responds most of the time and the instructor observes, analyzes and interprets the responses of the learners. The major source of information for the content and structure of conventional classes is the experience of the instructor and some form of a document, usually a course outline. In learner-oriented instruction, the content and structure is determined by the learners' experience and the course objectives or terminal behaviors required.

The need for learner orientation is not new and most effective teachers have long sought to serve the learners' needs by adapting to the learners' experience both in terms of preparation of course outlines and in the spontaneous activity in the classroom. Individualized instruction formalizes this approach and through use of prepared response sequences and systematic revisions continuously improves the quality of the instruction.

The first problem facing a training or educational technologist is to define or describe the set of behaviors which represent the real world environment or the environment where the learner must use the things learned. Let us assume there is a set of behaviors which will be required of any learner in the real world or in the next class. Each behavior in this set or small coherent groups or classes of behaviors from this set need to be learned. By use of task analysis methods, each of these groups or a single behavior in the set can be described with words or other symbols. The analysis methods include the major techniques of job or real world observations and critical incidents. Other methods sometimes used on low budget systems are experts' consensus and educated guesses. Regardless of the technique used, it is very important that as many behaviors as possible are described with explicit statements. These statements are sometimes called the objectives, terminal behaviors, terminal job specifications or criterion behaviors for the course of instruction. It is important to distinguish between these statements of job or real world requirements and the actual behaviors from which the statements are derived. The statements are simply symbolic representations of the actual behaviors and are subject to inaccuracy and misinterpretation.

The next phase of this technology is to map each job requirement statement to a statement of training requirements. The purpose of this mapping is to restate the job requirements as training requirements. Often the job requirement is identical to the training requirement. For example, a job requirement might be "to solve an algebra equation from a given set of known values". The training requirement can very easily be the same statement. However, if the job requirement statement were to be "locate and repair a given type of trouble in a certain telephone central office", then the training requirement probably could not be identical since there is usually no such central office available in the training center. Instead, the above statement might map to the statement "list the six possible faults that may have caused a given set of trouble symptoms to exist for a certain telephone central office". The training analysis techniques and considerations include: 1) selection of media or the means of communication to be used between the learners and the instructor or between the learners and the teaching program; 2) response modes or the manner in which learners will respond, such as completion frames, multiple choice questions or the manipulation of real objects; 3) feedback techniques which are the manner of telling learners their progress and providing correctness of each of their responses; 4) response patterns which determine the sequence and structure of the content of the training; and 5) evaluation methods which are the means of determining when training requirements have been met. This set of training requirements is the set of terminal behaviors of the training process itself. At this point, the how to teach emphasis becomes important since the training or teaching methods must be developed which ensure that learners acquire the behaviors listed in the set of training requirements.

The final phase of this technology occurs after the training requirements have been learned. A follow-up analysis is now required to make sure that each learned behavior maps to a real world requirement. Methods used here are similar to those in the original task analysis Again the most effective tools are job observations and critical incident techniques. When they are available, work indexes and other job performance measures are useful. This last phase is extremely important as it is at this point of closing the loop that we can correct errors in the early phases of the training development. If the training requirements do not map back to the real world requirements, then necessary corrections must be made at all points in the loop to insure that the behaviors required in the real world are covered.

Conventional or group instruction methods make use of training requirements to solve the training or education problem. The training course is developed based on the training requirements. Before instruction, a given group of learners will have some of the relevant terminal abilities and some nonrelevant abilities. Most of the nonrelevant abilities are meaningless as far as the required abilities are concerned, but some of them may interfere and thus need to be extinguished or replaced. In any case, the training course must be designed for the entire population of learners. A group of learners will be given the course and as a result will acquire a new set of abilities. The most effective courses will produce groups of learners having most or all of the desired terminal behaviors with a minimum of interfering nonrelevant behaviors. Unfortunately, many courses are not effective and produce many nonrelevant behaviors and not too many of the desired abilities.

Individualized instruction methods use the same set of training requirements, but the training is developed quite differently. The set of training requirements are sorted and grouped into small units. The training is designed to be administered individually on a self-paced basis. Individual feedback and evaluation methods are used. For individualized instruction, it is necessary at this point to analyze the abilities of each person in the learner group. Pretesting should be used where it is doubtful that a unit of training is needed.

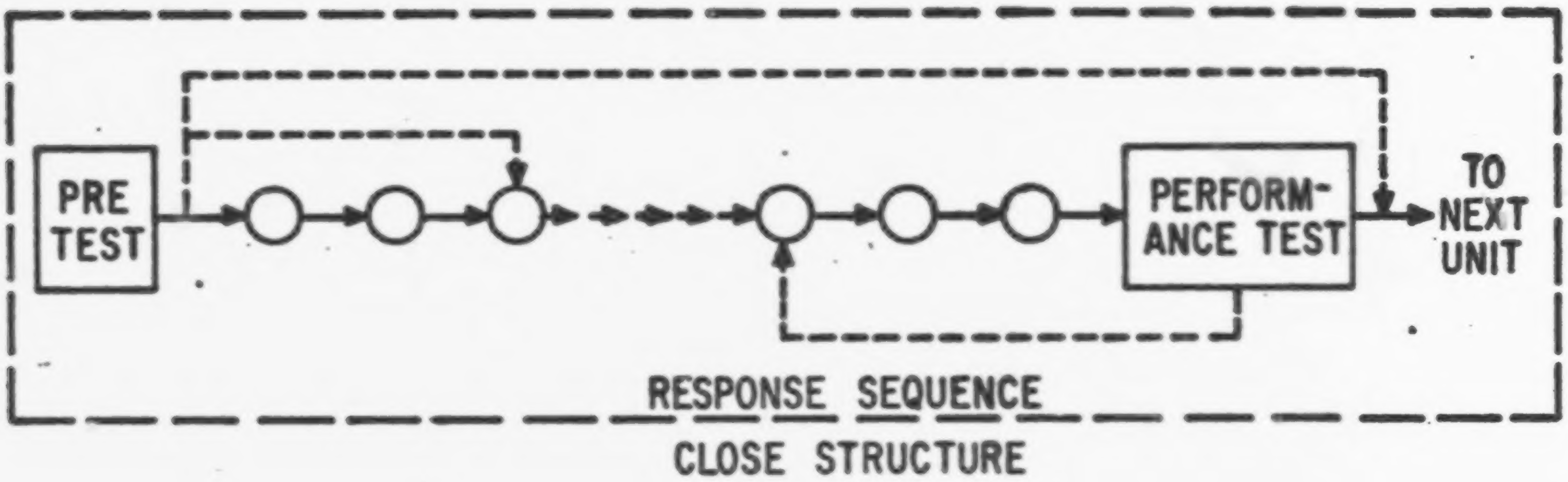
The actual training units have three basic structures and these structures are labelled according to the structure of the response sequences in the learning unit. Figure 2 uses close structure similar to a linear programmed instruction unit. In this unit, pretests and performance tests are used to determine before- and after-abilities. If some terminal ability is found at the start of the unit, then appropriate groups of responses may be omitted or skipped by the learner. If weak areas of terminal behavior are identified on the post-test, then groups of responses may be used for review learning. In this unit, the responses are carefully constructed and each response is made by all learners in the same sequence. Figure 3 illustrates a loose structure of responding. In this loose structure unit, objectives and a self-test are provided. Also, all existing procedures and sources of information to aid the learner are listed and made available to him. The learner selects a program, procedure, or possibly asks questions of the instructor. When the learner feels he is ready, he asks for and is given a performance test. If he meets the requirements of this test, he proceeds to the next unit. If he does not meet the test requirements, then he reviews the materials and again when he feels he is ready, asks for another performance test. Counseling is used at this point to assist the learner in selecting his review programs. Figure 4 is a medium structured response sequence. This model can be developed fairly fast and has many advantages for learners who need some help in moving through the learning material. In this unit, a brief description of the objectives to be learned is provided after the pretest. Following this brief overview is a sequence of exercises. Each exercise includes most of the terminal responses required, but the early exercises have many prompts or cues. Each succeeding exercise has less cueing until the final exercise which has no cues or prompts and is titled a criterion frame or exercise. This criterion frame is a sample of the performance test. All exercises and criterion frames are self-scored. After the criterion exercise, a performance test is given and in most cases, the learner passes since it is an alternate form of the criterion exercise. Should the performance test be failed, the learner is required to recycle through the unit.

One example of an individualized unit of training is of our department's experience with a course on Decision Tables. This course was developed over a two to three week period to meet a demand for a quick training package. The first step taken was to run a lecture course from an outside organization on a contract arrangement. Based on this class and standards that had been established by the in-house EDP (Electronic Data Processing) support group, a set of training requirements and a criterion exam were developed. A second lecture class was conducted and the exam results are shown on Figure 5. The EDP subject matter expert indicated that a score of 40 was the critical score for determining qualified graduates. In the class of 14 men, 5 passed this critical score and 9 failed. The time to complete the course was 20 hours and this was fixed for all students. While this course was being conducted, a medium structured response sequence unit (see Figure 4) of individualized instruction was developed. After one revision based on a 5 student pilot class, the unit was used to train 14 more students from the same source of learners as the previous class of 14 lecture students. The results of this training are also depicted in Figure 5. Of the 14 students, 11 passed and 3 failed the criterion score. Equally important is the time required to complete the training. The fastest student took 6.5 hours and the slowest 21.5 hours with an average of only 11.5 hours which was considerably lower than the lecture class time of 20 hours. This result is typical of individualized training. The slower students are allowed sufficient time to acquire all of the objectives while the faster students more than cancel the additional time required by the slower learners, resulting in most or all students meeting the desired objectives and usually with an average time less than that required by a lecture course on the same material.

Individualized instruction has been used successfully in the Bell System in courses ranging from pole-climbing and working aloft to the training of maintenance men for electronic switching systems. It has been used to train clerks and secretaries and there is even a plan to develop individualized units for teaching vice-presidents how to interview affluent stockholders. The real gain from using individualized instruction is realized only when a systematic approach is used to provide a continuous and professional emphasis on what to teach, how to teach, and how to evaluate.

|  | ORIENTATION |  |
|---|---|---|
|  | CONVENTIONAL (INSTRUCTOR) | LEARNER |
| KEY PERSON | INSTRUCTOR | LEARNER |
| MAIN FORM OF COMMUNICATION | INSTRUCTOR → LEARNER | LEARNER → INSTRUCTOR |
| MAJOR SOURCE OF INFORMATION FOR CONTENT AND STRUCTURE | INSTRUCTOR EXPERIENCE AND COURSE OUTLINE | LEARNER AND OBJECTIVES |

FIGURE 1: Comparison of Conventional and Learner Orientation



PRE TEST
PERFORM-ANCE TEST
TO NEXT UNIT
RESPONSE SEQUENCE
CLOSE STRUCTURE

FIGURE 2: Symbolic Representation of Individualized Training Unit Where Responses are Structured Closely

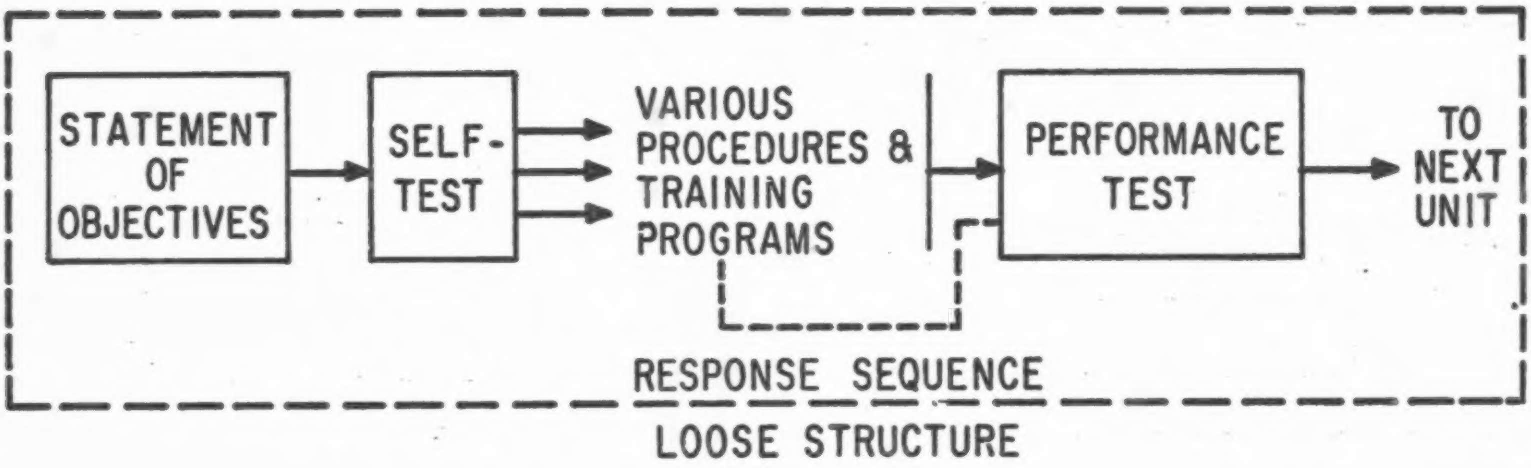

STATEMENT OF OBJECTIVES
SELF-TEST
VARIOUS PROCEDURES & TRAINING PROGRAMS
PERFORMANCE TEST
TO NEXT UNIT
RESPONSE SEQUENCE
LOOSE STRUCTURE

FIGURE 3: Symbolic Representation of Individualized Training Unit Where Learner Selects Responses in Learning Sequence

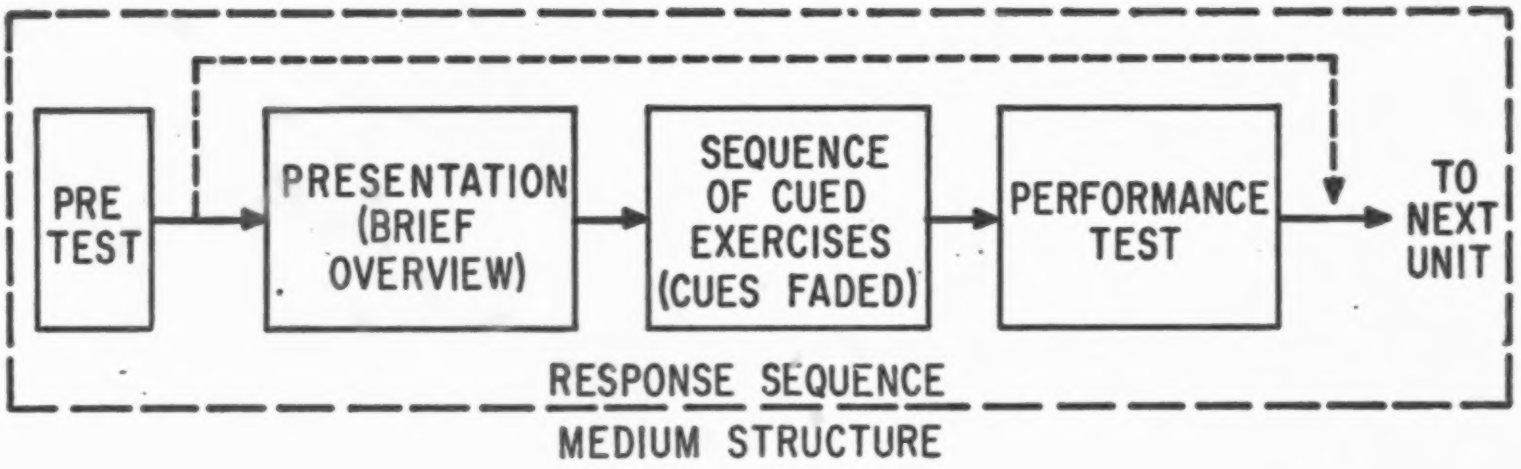
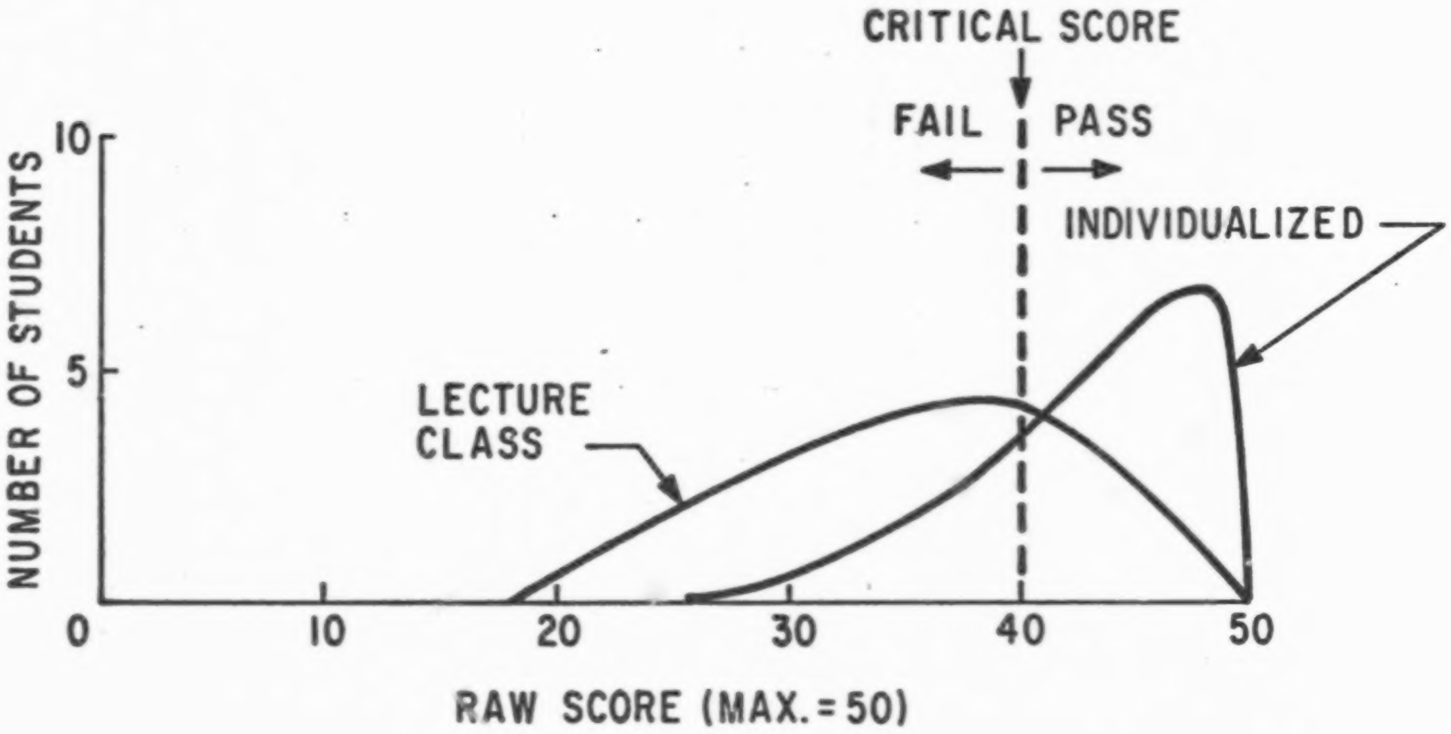

PRE TEST
PRESENTATION (BRIEF OVERVIEW)
SEQUENCE OF CUED EXERCISES (CUES FADED)
PERFORMANCE TEST
TO NEXT UNIT
RESPONSE SEQUENCE
MEDIUM STRUCTURE

FIGURE 4: Symbolic Representation of Individualized Training Unit Where Learner Responses are Only Partially Prestructured

## DECISION TABLE TRAINING UNIT RESULTS



| | | INDIVIDUALIZED |
|---|---|---|
| PASS / FAIL RATIO | 5 PASSED<br>9 FAILED | 11 PASSED<br>3 FAILED |
| TIME TO COMPLETE | 20 HRS (FIXED) | 11.5 HRS (AVG)<br>(RANGE = 6.5 - 21.5) |

FIGURE 5: Results of Trial Comparing Group Instruction with Individualized Instruction

# EVALUATION

Because the Institute was the offspring of a marriage without benefit of precedent, necessity and not principle dictated the efforts to clarify goals. However successful these efforts may have been, they provide some evidence that only a clear vision of objectives will insure survival after all the catastrophes that are bound to fall on a week-long program. Prime Ministers declining, changed dates, defecting speakers, changed format of sessions -- all these magnificent misadventures befell the Institute, and if the integration and sequential development held secure it was because the objectives had been welded into the entire framework of the program, the DNA of the Institute's genetic structure.

And that's exactly it. Defining the objectives is only the beginning. It is fine as far as it goes, but like most human relationships, it doesn't go far enough.

How can it be determined if these carefully defined goals satisfy the needs of the extension directors? Even more vital in the case of the Institute: how do we know if the message got across? To quote Philip Coombs: "The majority of universities in the world have yet to install a modern system of internal management in which administrators, teachers and students all play appropriate roles." To put it delicately, there appears to be a resistance among educators to the introduction of the principles of professional management. Coombs likens it to the well-known example of hospital administration; most large hospitals have now been rescued from the hands of doctors, and most small hospitals make every effort to introduce the doctors to administrative training. And note that medical graduates are generally credited with a higher-than-average level of competence among the university population.

Predictably, then, evaluation revealed that some of the participants are not satisfied that the management theories presented in the Institute could be related to extension practice. Even if by some miracle the theories were all entirely true, it would have been very strange indeed if they had gained universal acceptance,and the Institute had in one week resolved a problem that Philip Coombs finds common to educational systems around the world.

Admittedly, similar difficulties arise in any group learning experience (see Glen Valentine's Technology of Individualized Instruction), but the point is that merely adding gobs of time -- though more time would have helped -- does not resolve all of these difficulties. The objectives must be defined and re-defined on the basis of continuing evaluation, integral feedback systems and constant testing in the field.

Great theory. But for all that has been written on the importance of evaluating programs, no conference evaluation instrument could be found that was appropriate to the Institute. A coordinator in one university's School of Business expressed astonishment that the Institute dared to expose speakers to the embarrassment of evaluation and participants to the nuisance of questionnaires. It is true that many evaluations are mere popularity contests but it is sad to find that these objections end in the abandonment of evaluation in what is supposed to be a learning situation. In effect, many adults gathered specifically to learn, are rejecting research into their learning. Is it too extreme to suggest that they are really rejecting learning. Evaluation is if anything involving, and surely anything less than involvement is not meaningful learning.

Even if the program planner is certain that the conference or seminar that he is organizing is a once-only experience, the more evaluation even gropingly undertaken, the closer we may come to a discipline. The closer we come to a method of defining instructional objectives for the participants of conferences and short courses, the more we will learn about the learning process.

Short of that ideal, here are a few entirely pragmatic benefits of the evaluation process:

1. If learning begins with involvement, a questionnaire on the proposed themes begins the process of involvement.

2. By making up the questionnaire from the content of the presentations, the coordinator can push the speakers to prepare and orient towards the needs of the participants.

3. Evaluations help to clarify the presentations for the participants, to direct their attention to the relevancy of material to their own needs.

4. If the program is sequential, questionnaires before any session can alert the planner to any need for change in content, or redirection of the resource people.

5. If there is to be any follow-up whatsoever, even with different content and participants (but in the same field), you are better equipped with data than without it -- if you know enough to use the data with appropriate reservations. (For example, T-groups can appear quite threatening, so that evaluations in this area are especially difficult to assess.)

6. Correlation of various evaluation techniques provides a related profile that turns up otherwise deceptive data. For example, if a pre-session questionnaire reveals that a participant disagrees with a fair number of points that the speaker hopes to put forward, you have a pretty good clue to the source of the participant's ultimate evaluation of the session.

7. Above all, the effort to evaluate demonstrates to the educator-participants that education and learning are intimately bound to evaluation. As a form of research it is fairly superficial, but it is a beginning to the collection of data. The alternative is to do this year what we did last year just because we did it last year, and people suffered through it.

8. Finally, someone somewhere may use it, and do better.

## THE METHODS

Cost is a problem. A useful method of evaluation employed by behavioral scientists is the pre- and post- (test) management questionnaire administered to the staff of organizations involved.[1] Such a major operation was beyond the Institute's resources, unfortunately. So:

1. Each day of the Institute, the participants were asked to record the most and least useful session of that day.
2. At the end of the Institute, they recorded the two most useful and two least useful sessions of the week.
3. From the content of five presentations, each of the five speakers selected eight major points that he hoped to argue. Wherever possible, these statements were re-worded to imply a judgment -- i.e. the word 'should' was implied in the statement. In addition, about half the statements were reversed into negatives. These eight statements were then presented to the participants immediately before the relevant presentation, with a five-point Likert-type scale, from Strongly Disagree to Strongly Agree. The middle square was marked Don't Know or Neutral to avoid 'forcing' a position. After the Institute, those statements that showed disagreement with the views presented by speakers, or split views among the participants, were organized into twenty-five statements and mailed to the participants. As only nine of the fourteen replied, the 'statistical' significance of changes is not important, but as a matter of interest, appended here are eighteen of the twenty-five questions sent to the participants two months after the Institute. For simplicity, the scale is collapsed into Disagree - D; Neutral - N; and Agree - A. The name and view of the speaker precedes the enumeration of the participants' responses (as the original statements were expressed positively, the speakers are shown to disagree - D, with a reversed phrasing.)

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[1] See Rensis Likert's The Human Organization, New York: McGraw Hill, 1967.

4. Unobstrusive Measures: this was an attempt to complete the evaluation profile without alerting participants that is was evaluation. At the beginning of the Institute each participant was given a notebook marked off into various sections. In Section A they were told to select parts of the program for publication, by taking notes to indicate the specific sections that they thought important enough to publish: i.e. what portions of a speech; what points in a discussion. In Section B they were asked to recommend certain subjects (whether dealt with in the Institute or not) for future short courses in administration for extension personnel, as proposed by CADESS.

In the end these measures conformed to and supported the daily record of most-least useful sessions, and so added very little to the evaluation profile. In a sense they failed, but there was some evidence that greater success might have been attained if participants had been reminded of these sections each day: there was a tapering off. In any event, it seemed to be a means of helping the participants to analyse and summarize parts of the program for their own use.

There is no question that unobtrusive measures provide invaluable data to the evaluation process. Perhaps the tireless eye of the video-tape recorder and the data processing possibilities of the computer are the most obvious aids of the future: an unusual challenge in research design and ingenuity.

## POST-INSTITUTE QUESTIONNAIRE

1. Enrolments will continue to rise, but normal departmental growth can handle the demand.

| | D | N | A |
|---|---|---|---|
| E.F. Sheffield (D): | 5 | | 4 |

2. Students' campaign for improved teaching will have direct effect on improved teaching of adults in extension.

| | D | N | A |
|---|---|---|---|
| E.F. Sheffield (A) : | 2 | 3 | 4 |

3. Establishment of provincial agencies for the planning, coordination and financing of higher education will result in greater financial support of extension.

| | D | N | A |
|---|---|---|---|
| E.F. Sheffield (A) : | 2 | 2 | 5 |

4. Written definitions of authority and responsibilities are not essential in small organizations.

| | D | N | A |
|---|---|---|---|
| W.R. Benn (D) : | 5 | | 3 |

5. There is a limit to the number of subordinates one administrator should supervise. The limit is six.

| | D | N | A |
|---|---|---|---|
| W.R. Benn (A) : | 5 | 1 | 3 |

6. Management of University Extension is essentially no different from management in other kinds of enterprises.

| | D | N | A |
|---|---|---|---|
| W.R. Benn (A) : | 4 | 1 | 4 |

7. It is not possible to pinpoint definite accountability for specific, defined results, in each of the several senior positions in an extension department.

| | D | N | A |
|---|---|---|---|
| W.R. Benn (D) : | 7 | | 2 |

8. An extension program coordinator can do a very satisfactory job without understanding research.

| | D | N | A |
|---|---|---|---|
| James A. Draper (D) : | 4 | 2 | 2 |

9. Involvement in some study or systematic area of enquiry should be one of the measuring instruments in the performance of university extension staff.

| | D | N | A |
|---|---|---|---|
| James A. Draper (A) : | 2 | | 7 |

10. It is not necessary to build evaluation into all programs which are coordinated by a university extension division.

| | D | N | A |
|---|---|---|---|
| James A. Draper (D) : | 7 | 1 | 1 |

11. All extension divisions should have at least one staff member who is responsible for coordinating research.

| | D | N | A |
|---|---|---|---|
| James A. Draper (A) : | 1 | 1 | 7 |

12. An extension director should teach as well as be an administrator.

| | D | N | A |
|---|---|---|---|
| A.A. Liveright (A) : | 2 | 3 | 4 |

13. If the extension director does not determine the objectives of the total program, it is impossible to select the most effective learning situation.

| | D | N | A |
|---|---|---|---|
| A.A. Liveright (A) : | 4 | 1 | 4 |

14. In terms of effectiveness of training (i.e. ability of people to perform after training) a job requirements analysis will have more influence than the methods used in training.

| | D | N | A |
|---|---|---|---|
| C. Glen Valentine (A) : | 4 | 1 | 3 |

15. Education and training are not the same insofar as the learning process is concerned.

| | D | N | A |
|---|---|---|---|
| C. Glen Valentine (D) : | 3 | | 6 |

16. The emphasis should be upon the attainment of behavioral objectives by students rather than upon the teaching of content.

| | D | N | A |
|---|---|---|---|
| C. Glen Valentine (A) : | 1 | 1 | 6 |

17. Since individuals vary in capacity to learn, it is improbable that a group of learners would acquire a set of terminal behaviors as effectively as a group as they would individually.

| | D | N | A |
|---|---|---|---|
| C. Glen Valentine (A) : | 7 | | 2 |

## THE DELPHI PROBE

The probe was introduced to participants as an exercise in long-range forecasting. Its format was borrowed from the technological probe used by Dr. Harper Q. North of TRW Inc., of the U.S.A. Unfortunately, due to lack of time, only Phase 1, comprising the unqualified predictions, 1968-1988 , was completed. The synthesis of these predictions by all participants (Phase II) was to be completed by them after the Institute, and quite predictably most of them found this impossible in the pressures of everyday work.

Nevertheless, a few of the predictions of the first phase are reproduced here without the precise dates, to indicate the possible scope of the exercise. The Phase 2 Form is appended; the reader may find it instructive to organize the predictions into the Phase 2 categories.

### Predictions in Education:

A complete organization of travel courses (travelling seminars), including other countries.

Free university education.

Free education at all levels.

Most universities will operate degree-granting Evening Colleges for part-time students.

The majority of Extension Departments will become full-fledged faculties.

There will be widespread integration of Extension into functions of university departments and disappearance of Extension Departments.

Enrolment will triple.

A graduate degree in adult education will be required for employment in university extension.

There will be a five-year increase in the population's educational level.

Socio-political:

A national education policy will be developed, leading to direct involvement of federal and provincial governments in University academic planning and program planning in Extension.

If the present movement continues, Quebec may become an independent state.

The work week will be reduced to 25 hours.

Classes will be held in multi-purpose one-building satellite cities.

40% of the eligible age group in Canada will go to college and/or university.

Community Planning will enter an age of greatly expanded and imaginative activity. This is probably the best point of contact for the adult educator planning for the future. It is here that new ideas will be examined as to how people can live together more effectively - a process which clamours for attention by adult education.

## Technological:

Most universities will offer a substantial selection of credit courses by television.

At most universities, lectures will be audio and video taped and made available for playback in university library carrels.

Lectures by outstanding scholars or 'master teachers' will be broadcast to multiple smaller groups under the direction of tutors. Inter-university distribution will be developed, including courses by professors of other countries by satellite.

Free public services will be developed for the programming of factual material.

Inexpensive global communication systems (involving audio visual and transportation capabilities) will be available to nearly 100% of the earth's population.

Chemical methods will be evolved to increase mental capacity for certain mental processes.

There will be new methods of teaching languages rapidly.

Home credit courses through TV; home information retrieval systems, etc.

## Economic:

Some provinces will bring all public universities under a common board and all extension departments into a single organization, working out of all campuses.

There will be widespread forms of common market; union between Canada and the U.S.A.

The Canadian north will be Settled.

Age for retirement will be 45 years. Thus, there must be special courses for re-education of retired adults.

Workers will spend a specified part of their working time taking courses at university.

Private business will enter the field of education with a 'total package' (i.e. buildings, curriculum, staff) at all levels (except post-graduate) of education.

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